

Porting in a storm?

In the post walled-garden era for content, what happens to the companies offering to tackle fragmentation and localisation? **Mobile Entertainment** investigated...



Glu's Greg Ballard made a lot of headlines 18 months ago when he revealed that the mobile version of *Transformers* came in 25,000 SKUs – across Europe alone. That's multiple formats times multiple operator APIs times multiple languages. The admission had an element of despair, but it also served as a warning to outsiders: don't even think about getting into this business, it's a bloody nightmare.

Since then, of course, the industry has undergone a radical transformation. The operator walled garden, patrolled by huge publishers such as Glu, Gameloft and EA, is being challenged by an open app-store model that in theory offers access to all and sundry. Last month, Vodafone added its name to the list of giants entering the app store space, promising to open up and simplify its APIs to reduce the fragmentation issues for developers.

A number of companies now offer services to help tame fragmentation. DeviceAnywhere, for example, offers a Software-as-a-Service (SaaS) solution that provides instant access to more than 2,000 devices on over 30 different carriers from a PC.

Meanwhile, France's Mobile Distillery offers an automated porting suite called Celsius that lets developers port and backfill an app from a single Java source code to more than 1,000 devices worldwide. In the area of localisation, Universally Speaking, Partnertrans, BabelMedia and others exist to bring apps to different regions round the world.

So the question for the companies offering services such as porting, testing, QA and localisation is this: are the changes sweeping across the industry good or bad for services specialists in the space? It's a tricky one. It certainly changes the

Handsets and operating systems are released and updated so quickly that it can sometimes seem a bit of a blur

◀ dynamics of the market. The old operator portal model required a centralised approach targeted at giant companies with global distribution. Now, there are thousands of content creators out there. But they still need to meet QA criteria. The market is still there, just in a different form.

The other new factor to consider is the growing importance of the emerging markets. Accelerating mobile subscriptions in the BRIC countries, Africa and the Middle East offer opportunities for content providers, and their localisation partners. Here's what the insiders think...

Have you seen any general signs of the fragmentation issue being 'tamed'?

Faraz Syed, CEO, DeviceAnywhere: The numerous initiatives aimed at bridging the OS divide just added to developer headaches, forcing them to develop for even more platforms, or risk minimal uptake. Even initiatives based on the same platform, such as Linux, are diverse enough to necessitate independent testing.

So the issue of fragmentation is likely to remain in the future, with mobile operators and handset manufacturers both seeing the mobile OS as a unique selling point. All parties have made it clear that they do not want a repeat of the PC industry where they hand over their destiny to American software makers.

Hardware fragmentation is also a consideration, often overlooked when people discuss this issue. The diversity of handsets across multiple operators around the world already

Dialect is important... most people aren't aware that there is no single Indian or Chinese language.

presents a stumbling block to companies bringing content and applications to the public, with numerous combinations of interfaces, processors, screen sizes and connectivity requiring a myriad of versions to be built and tested.

What's your view of something like JavaFX? Will it make development across different devices easier?

Faraz Syed: JavaFX represents an exciting opportunity for bridging the



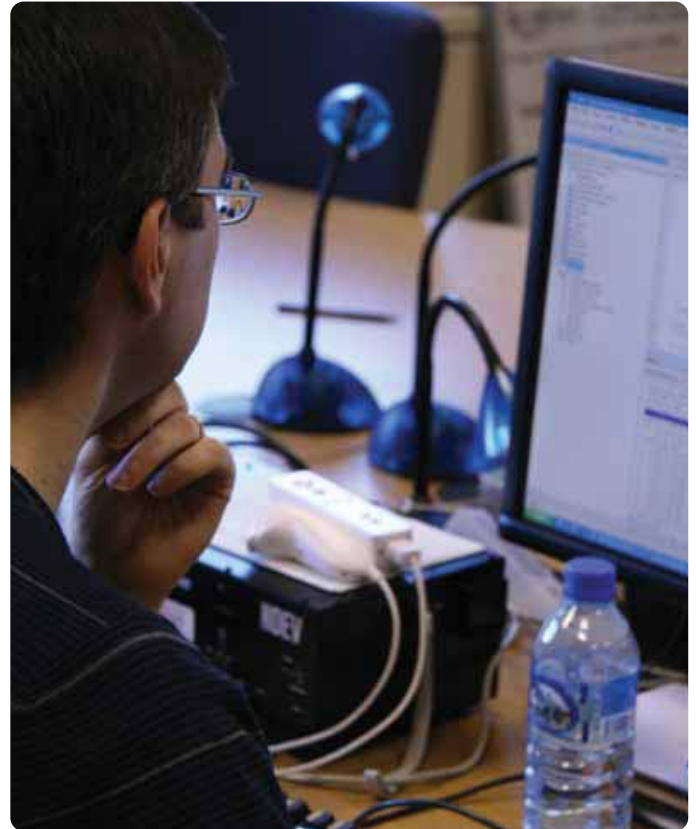
TOP-BOTTOM: DeviceAnywhere's Faraz Syed, Babel Media's Keith Russell and Partnertrans' Iris Ludolf

divide between multiple screens, making the deployment of rich apps across a number of platforms much simpler. However, it is another mobile operating system for which to develop, and it's targeted at the high-end feature phone market, whereas the real growth is in the lower-end. Fragmentation issues are likely to plague the development community

for the foreseeable future and there is no single panacea in sight.

How do you assess the impact of app stores?

Iris Ludolf, director, international operations, Partnertrans: App stores provide a fantastic opportunity for small games that didn't find a market before, as they were too small or too niche to be published via regular means. However, in order to increase user accessibility and reach an ever



bigger market it is imperative to have those applications localised.

Faraz Syed: As more app stores are created, certification and testing remain the greatest barriers to realising revenues quickly from mobile application development. As operators, handset makers and even operating platforms begin to launch in the marketplace, the time and money spent on the certification of apps looks to spiral out of control, and the quality of those certification processes will play a key role in the success of those app stores.

What are the challenges and opportunities presented by the growth in India and China?

Iris Ludolf: Apart from the many technical aspects, on the language side there are quite a few dialects you have to cover to access the full potential of those markets. And actually many people aren't aware that there is no single Indian or Chinese language.

Does connectivity create an opportunity? If an app connects to

the network, then surely that adds a new layer of complexity.

Keith Russell, VP, sales and marketing, BabelMedia: It is a testing nightmare to be honest, because each network and handset behaves slightly differently. This means you don't really know for sure the app will work until you test it in the network, with that SIM card on that handset. No emulator will tell you for sure, so welcome to the flying tester, armed with a clutch of phones, and a plane ticket as he roams the globe testing in-network.

As content gets richer, are you seeing more audio in mobile apps? What challenges does this bring?

Iris Ludolf: I haven't seen too much of this yet in games. Audio obviously takes up more memory than text and most games are still targeted at mobile users with a wide range of handsets, so memory remains an important consideration. We did a few recordings for mobile games, though, but as we are experienced in audio recordings for other platforms as well, there were no specific challenges.