



enabling the digital home



The Digital Home

Imagine you could watch and narrate your summer vacation pictures on TV to your parents miles apart.

Imagine you could get TV programs personalized based on your watching profile.

Imagine you could remotely manage your home settings while you are away.

These are just a few examples of a revolution that will soon transform our lives: the Digital Home.

Key points

- > Next phase of the Digital Home is about full convergence
- > Market is ready but still missing a few enablers
- > Service Providers are well positioned to benefit from the Digital Home
- > Market needs an Home Operating Platform to deliver new services
- > SoftAtHome was created under the leadership of Service Providers for Service Providers

“Home is anywhere you feel at home”

This is one of the best definitions that can be applied to the Digital Home. Indeed the Digital Home connects people, devices and content together to access, create and share digital content in, around and outside the home. And the Digital Home doesn't stop here. It goes beyond the simple boundaries of the home to include the office, the car, the parent's house, a friend's place or the second home.



A day in the life of Lisa

The best way to further illustrate what the Digital Home is all about is to follow a day in the life of Lisa, as she experiences all the benefits brought to her by the future of the Digital Home.



06.45^{AM}
Lisa wakes-up to her favorite Internet radio station using her IP MP3 player connected on her HGW. Her sister calls her at home and she leaves her house. Thanks to her home phone that switches automatically to the 3G network, she is still able to carry on with the call.



08.00^{AM}
As she drives to her office, Lisa uses her interactive Electronic Programming Guide on her mobile phone to program the recording of Spiderman 4 on Live TV. The movie will be recorded on her USB memory disk connected to her HGW.



10.00^{AM}
At the office, one of her colleagues recommends a new application that she has been using at home. Lisa places an order over the Internet to her Service Provider which will remotely upload the new application and provision the service without any inconvenience to Lisa.



13.00^{PM}
During her lunch hour, Lisa makes a videoconference with her mobile to her mother who uses her TV at home as a videoconference screen. Lisa selects some pictures of her holidays stored on her media server at home and displays them on her mom's TV.



04.00^{PM}
Lisa receives an SMS which informs her that the babysitter has arrived at home with her child. She can check by video that everything is OK.



06.00^{PM}
Before going home, Lisa shares with her colleagues at work some pictures of her last holidays on her PC by connecting to her Media server where the pictures are stored.



07.00^{PM}
As she comes home Lisa controls what happened at home during the day on her TV screen and prepares for the evening: checking up on missed calls and emails, reviewing the intrusion detection system to check that all was well during the day, looking at TV programs, controlling the temperature in the different bedrooms and playing her favorite video on YouTube - all this on her TV.



08.00^{PM}
Lisa is invited with her child to the neighbors' place to watch Spiderman 4. Lisa plays the movie from her memory disk connected to her HGW at home on to the neighbor's TV. She is asked to rank the movie so that her user profile can be further defined.



10.00^{PM}
As Lisa checks the news on TV before going to bed, she can pick and select a set of information recommended thanks to her profile. She records a movie on her portable PVR that she will lend to a friend tomorrow.



03.00^{AM}
Late night - While Lisa is sleeping, the service provider upgrades Lisa's STB and HGW software to provision new services.



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The 3 phases of the evolution of the Digital Home



The Digital Home market is about to enter into the third phase of its evolution to deliver fully convergent services to consumers.

Some of the applications used by Lisa are already available today. Others will be part of our life in the very near future as the Digital Home is experiencing a rapid evolution that will make those services easier to implement and manage. The Digital Home evolution can be divided into three major phases.

More than five years ago, during the first phase, home devices— including phones, TVs, PCs and routers – were passive, not connected to each others and with limited connection to the network. Each appliance was delivering a well defined but independent end-to-end set of services to consumers. For example, a TV was delivering live TV and the phone was delivering communication completely separated from each other with no way to combine those services to offer higher value to end users.

Today, as we are experiencing the second phase of the Digital Home, home devices have started to be integrated to provide some limited convergent services within the boundaries of a given set of technology. For example, a household has: the Mac ecosystem that delivers and plays music, videos and internet services; the Sony ecosystem that provides games and video content; a phone and TV subscription from its Service Providers. Each ecosystem works as a separate silo.

In the near future, during the third phase of the evolution of the Digital Home, customers will be able to experience the full service convergence where any content will be played on any of the devices in the home making the Digital Home a reality. This will lay the foundation to a new set of services never envisioned before where content is no longer tied to a given type of device.

Market getting ready for the next phase

A lot of elements are in place today to move to the third phase of the evolution of the Digital Home. First the connectivity within the home is becoming mainstream as broadband and Wi-Fi connections are experiencing a double digit annual growth rate across the world. In parallel, the number of Digital Home devices that need to be connected to the network is dramatically increasing. Second, as content is becoming more and more digital, the need to share content among users is becoming more and more important. This is pushing the need for devices to connect to each other. And finally, consumers are asking for services that go much beyond the current level of convergence. They want to play content on the device that is the most appropriate and at the time they want.



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An opportunity for Service Providers

Among all the different players in the Home market, Service Providers (Telcos, network carriers ...) are well positioned to benefit from the Digital Home market. Indeed, they can provide a lot of the ingredients to move to the next phase of the Digital Home. In particular:

- > They control access of the different home devices to the network and hence better understand customers' profiles and behaviors,
- > They already manage key home devices such as Home Gateways and STBs on behalf of customers,
- > They can remotely manage devices inside the home, deploy and provision compelling services,
- > They manage always-on devices with simple reliable user experience,
- > They have many years of experience in delivering critical services such as phone and internet connectivity with a high level of Quality of Service,
- > They can interact with consumers both ways to provide interactive services,
- > They have an established and on-going relationship with end-users through billing,
- > They have established a high level of trust as they are already inside the consumer's home.

In addition, Service Providers are looking for ways to compensate for declining voice revenues and the emergence of over-the-top content.

Need for an Open Operating Platform

In order to leverage their unique capabilities and position on the market, Service Providers need a Home Operating Platform that will enable them to deliver new services while keeping control and monetizing them. SoftAtHome was created at the end of 2007 by Orange specifically to federate and meet the needs of Service Providers. With this unique position on the market today, SoftAtHome is inviting other Service Providers to join its shareholding structure in order to become the representative of Service Providers in the Digital Home market.

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