

News

Convergence Idea Gets Serious With Live Mesh, Analysts Say

by Jabulani Leffall

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Analyst reaction this week to Redmond's "[Live Mesh](#)" initiative can be deciphered in one of two ways. On the one hand, it's an old idea, namely "convergence," with new buzzwords. On the other, it means that industry leader Microsoft has become serious about playing hard ball with its more nimble competitors, working to simplify the end user experience in a Web 2.0 era.

As it turns out, it's a little bit of both.

"Conceptually, Live Mesh sounds an awful lot like HailStorm (.NET My Services) in concept -- a way to access your data from any device with an Internet connection," said Matt Rosoff, lead analyst for consumer products and corporate announcements at Kirkland, Wash.-based independent think tank Directions on Microsoft. "That idea was floated by Microsoft back in 2000, and was the subject of considerable work before they scrapped it for various reasons -- lack of a clear business model and partner model being the main ones in my opinion."

But this week seems a little different, experts say. Led by Microsoft's Chief Software Architect Ray Ozzie, the software giant came out in full force highlighting a new convergence model that would build a comprehensive Web services platform structured around a processing environment that splices together what Ozzie calls the "Three Cs: content, commerce and community."

It's another part of the company's "software plus services" approach, with an emphasis on data accessibility through synchronization.

"In other words," Rosoff said, "sync is a problem if you believe that you need that data on all your devices so you can take advantage of their local processing power. A 'pure' SaaS [software as a service] proponent would ask, 'Why can't I just keep data in the cloud all the time and access it via a browser?'"

David Wertheimer, executive director of the University of Southern California's Entertainment Technology Center, called the announcement a "dramatic one for Microsoft." Wertheimer has been studying methods, practices and technologies pertaining to such "anytime, anywhere" content models.

"The key question here is can a large company like Microsoft, long known for proprietary and relatively closed technologies, truly embrace a world that's about openness and lack of control?"

Wertheimer further posits that this idea has been around since the dawn of the World Wide Web, when Sun Microsystems first proclaimed that the "computer *is* the network."

"What Microsoft is realizing is that they can't stop what's going on," he added. "Google is everywhere but you won't find a single physical tangible product with

their name on it other than in the virtual space. And I think, rightly so, that Microsoft is going to leverage its very smart engineers and intellectual capital to make sure that their strength, a powerful OS that developers can build applications on, is played up."

Redmond's Ozzie all but acknowledged the need for a new and improved revenue model in Thursday's [Services Strategy Update](#) memo. In it, he described Redmond's intention to compete for eyeballs and ad dollars through this new initiative.

"As the '3 Cs' have evolved, so has the significance of online advertising as the economic engine powering our world of services," Ozzie wrote. "With growth projected from \$40 billion today to \$80 billion in the next three years, online advertising will continue to be the primary monetization mechanism for consumer services on the web."

Ozzie added that the ad platform will be a key element in this evolution. Microsoft is currently in third place behind Google and Yahoo in terms of search popularity, and has been trying to acquire Yahoo over the last few months.

Rosoff said that Ozzie's new program outlined in the memo doesn't have a direct correlation with Redmond's Yahoo buyout measures. Instead, it's "a clear attempt to capture some of the online advertising market that's powering Google's rise, taking the battle to Google's turf before Google gets too much farther into Microsoft's turf with SaaS replacements for Microsoft software, such as Google Apps."

Whether it's old news or a new day, Microsoft has proclaimed the Web to be "the hub," which is powered by a "web catalyzed services transformation."

Live Mesh launched Thursday, and Ozzie proclaimed the "power of the Internet, and the magic of software" across a world of devices. Now it will be intriguing to see how Web developers, channel partners, IT security pros, end users -- and most important, Microsoft's competitors -- respond.

Jabulani Leffall is an award-winning journalist whose work has appeared in the Financial Times of London, Investor's Business Daily, The Economist and CFO Magazine, among others. You can contact Jabulani about Convergence Idea Gets Serious With Live Mesh, Analysts Say at editor@entmag.com.

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