

VIDEO & TV MOBILE,

Players, contents, business model

Europe / Asia

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What is Netsize?

- Solution provider
 - mobile billing (SMS, WAP, MMS)
 - Content & platforms
 - Services
- 800 customers
 - Lanetro- Zed, 123MM-Index, Jamba!, Kodak, Sulake, Gameloft, ...
- €100 millions revenues in 2005
- 20 offices
- # 1 fastest growing companies in France
- # 2 in Europe



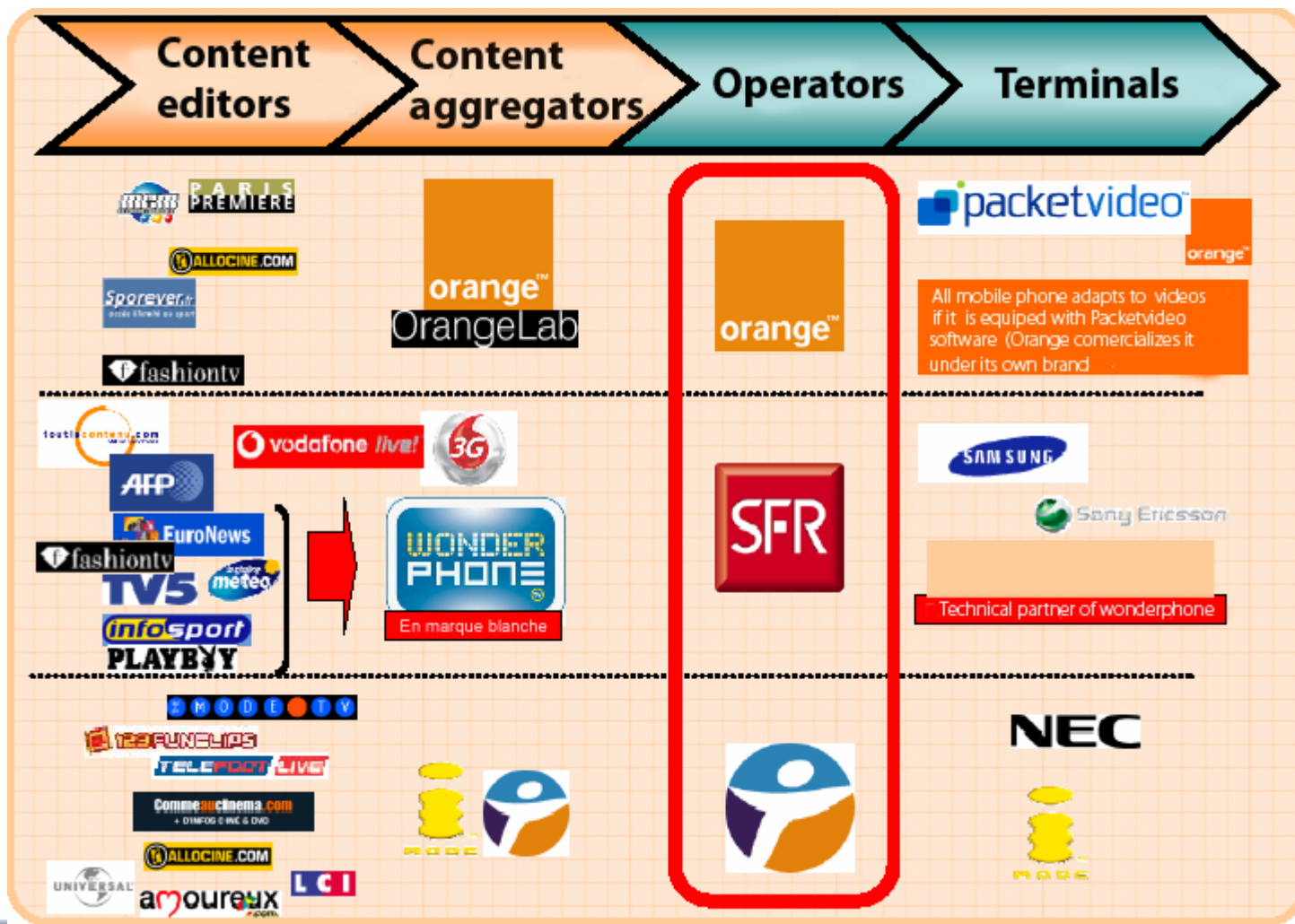
Video: 5 b\$ revenue by 2009 !

Zone	Period	Technologies	Turnover	Sources
Worldwide	at the end of 2000	DVB-H	25 million\$ per year (subscription)	IMS Research
USA	2009	NC	5.4 Billion \$	In-Stat/MDR
Worldwide	2008	All	5.4 Billion \$	ARC
Europe	2006	All	3.3 Billion \$ (Total Multimedia content)	Jupiter MMXI
Worldwide	2008	All	4.7 Billion \$	Wonderphone/Strategy Analytics

Ovum project 150m 3GPP video devices by end 2005

Mobile videos brings new players

Example of France



Mobile video usage in Japan

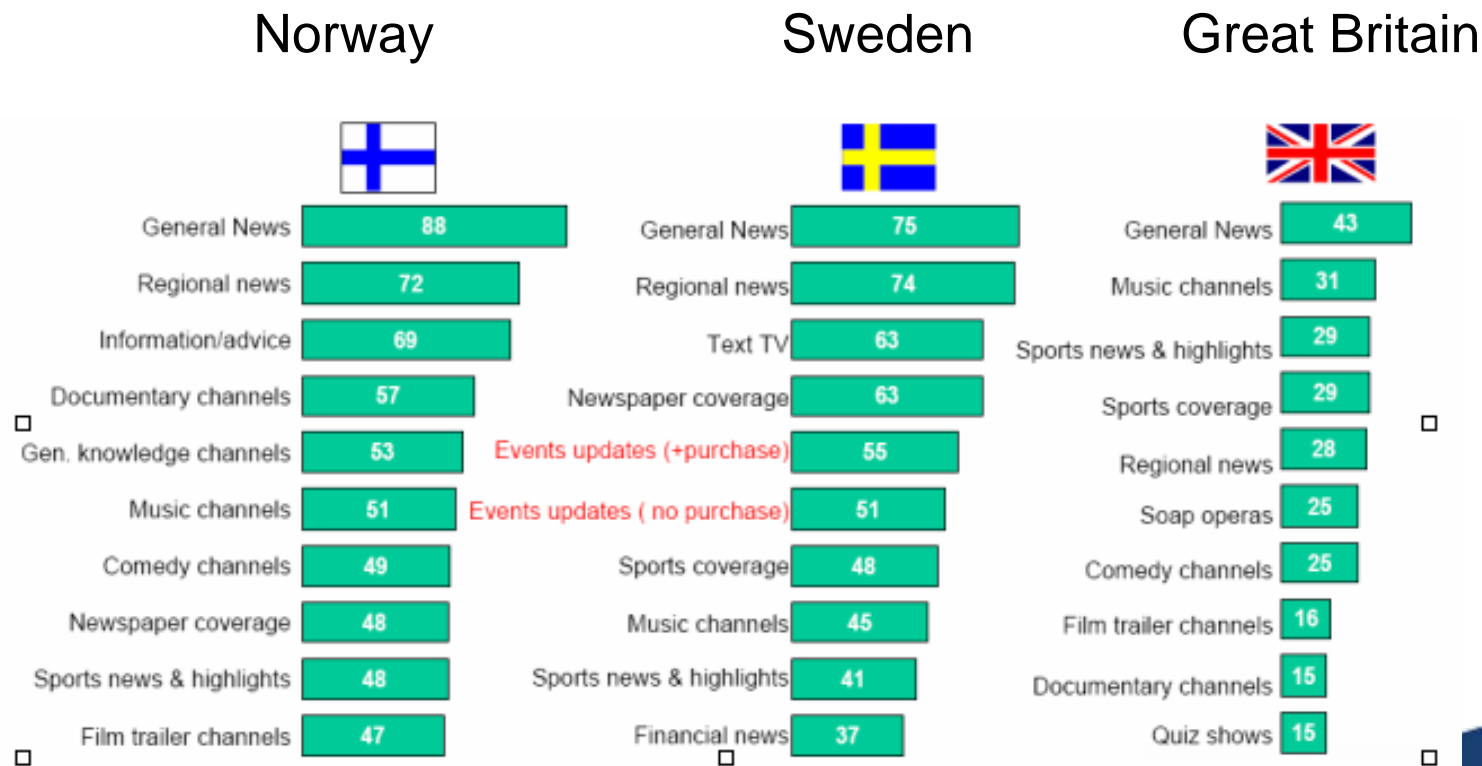
- 50% mobile phone users watches TV through their mobile phone.
- 15% among them watches TV on mobile phone everyday
- Privileged programs:
 - TV news (60%)
 - sport (49%)
 - entertainment (34%)
 - weather broadcast (27%)

Source: Network & Security Research Institute,
July2004

- Users hope that:
 - can watch the same programs like what they can do at home
 - find the same brand

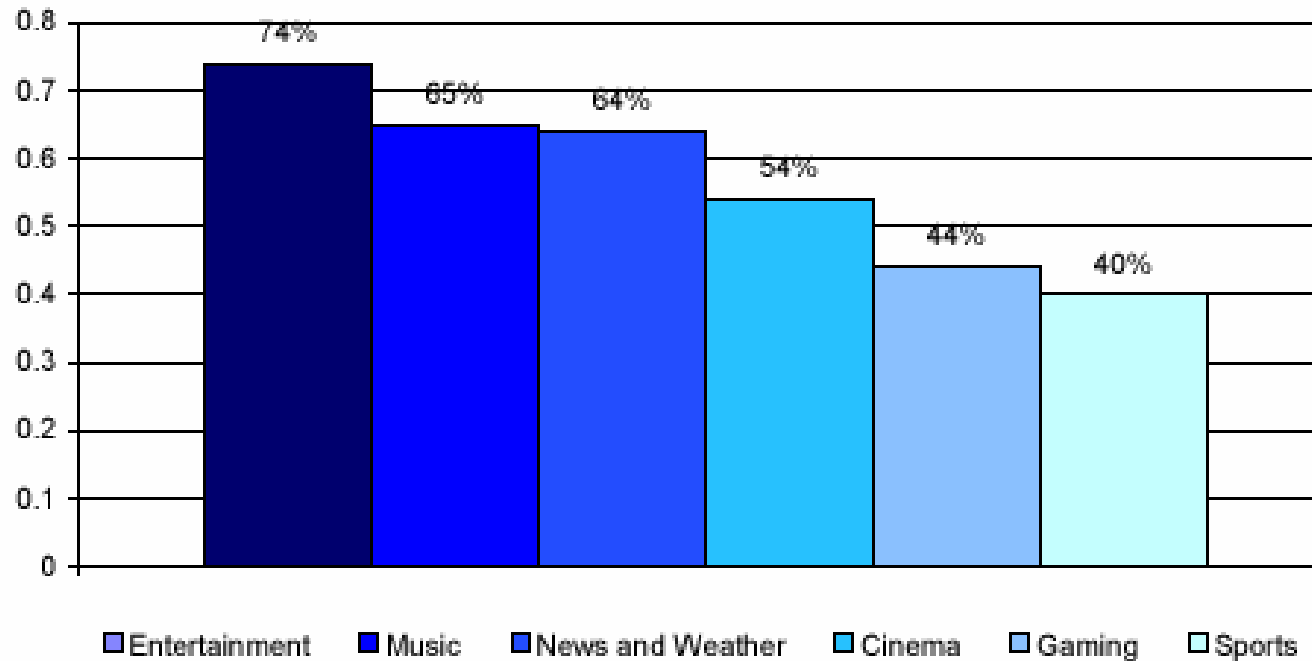
According to the fist experiences of TV on mobile

News, Music & Sport come as the most popular content



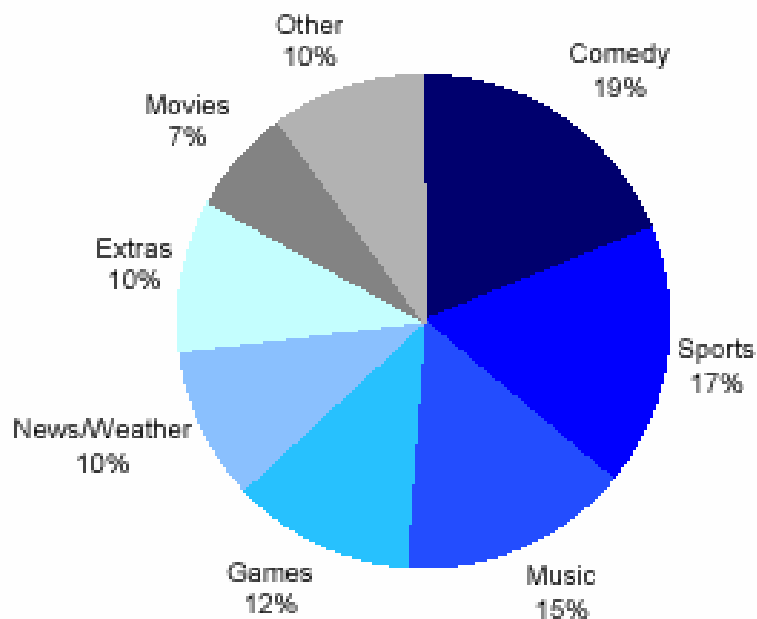
Source: Médialab

Service type of mobile video which brings profits



Source : Nokia Network/ NOP World Research (mai 2004)

The most popular video content on the portal « Today on 3 »



Source : 3UK, Global Mobile Subscriber Database

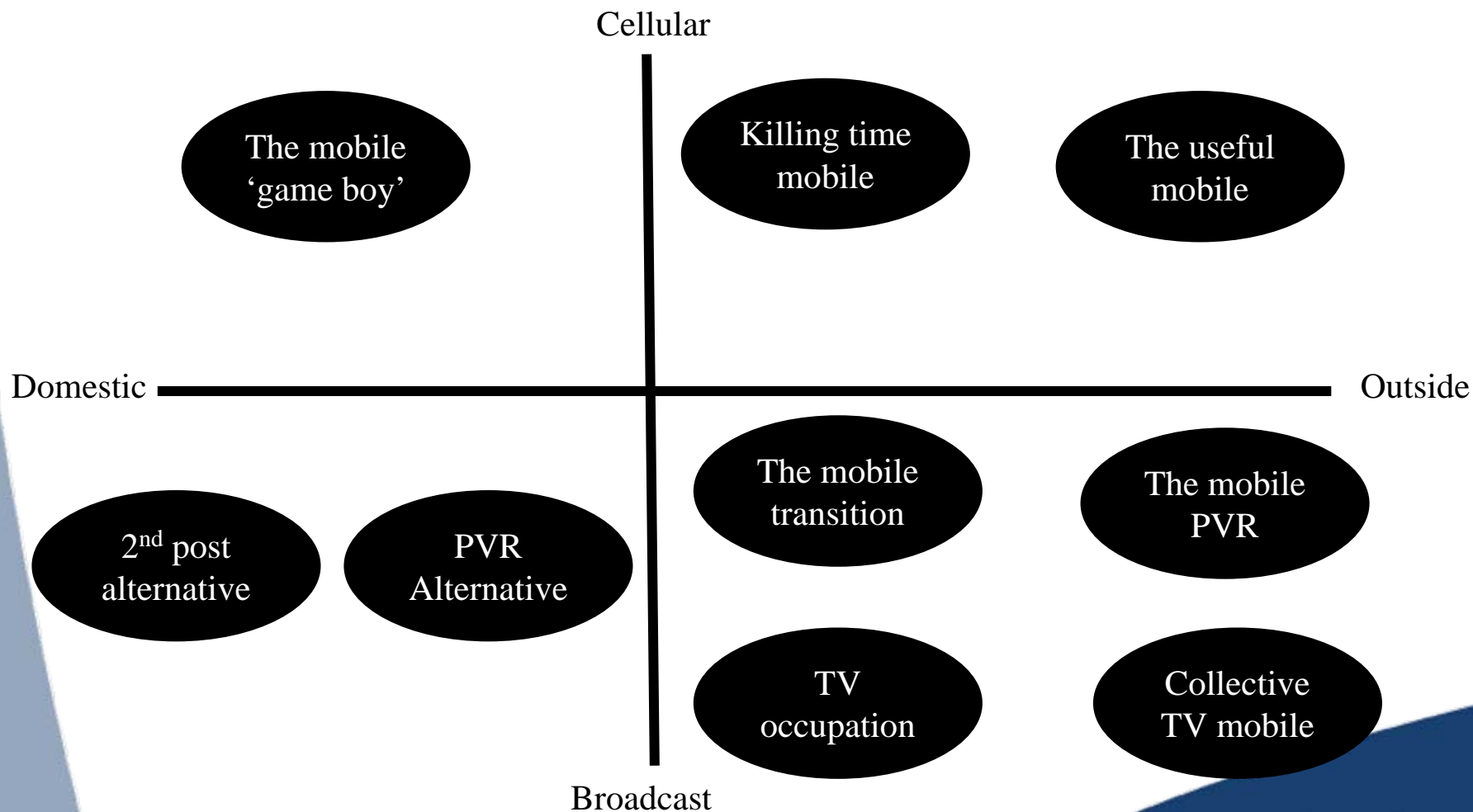
Available content- Vodafone (2004)

Rubriques	Vodafone Allemagne	Vodafone Irlande	Vodafone Italie	Vodafone Pays-Bas	Vodafone Portugal	Vodafone Espagne	Vodafone Suisse	Vodafone Royaume-Uni
Sports								
Actu sportive		X	X			X		X
Football	X	X	X				X	X
Sports Live		X	X					
Sports divers							X	
Autres / Bétisiers	X					X		
News								
Dépêches	X	X	X	X		X	X	X
Archives				X				X
Info Live	X				X			
Actu financière		X	X	X	X		X	
Musique								
Actu musicale			X			X	X	
Interviews						X		
Extrait vidéo			X	X			X	
Extrait audio	X						X	
Clip entier						X	X	
Chanson entière (audio)	X					X	X	
Sonneries							X	
Cinéma, séries et TV								
Infos people	X		X				X	
Actu cinéma						X		
Bandes Annonces Ciné	X	X	X	X	X	X	X	X
Bandes Annonces TV	X	X		X	X			
Mode				X		X		
Série	X						X	X
Fun, divertissement								
Cartoon	X	X	X	X	X		X	
Show TV comique								X
Bétisiers / Vidéos fun	X		X					
Charme								
Clips	X		X	X			X	
Voyage et Trafic								
Infos touristiques	X		X			X		
Infos trafic		X	X		X			
Météo		X	X					
Promotion								
Pubs TV Vodafone					X			
Clips publicitaires					X			

Main schema of mobile TV usage

Usage	Location	Screen type	Diffusion mode	Content types	Business Model	Flow
2nd post alternative	Home	TV- Laptop	Broadcast	Tradictional TV channels	Free/Subscription/Pay per act	Direct
PVR Alternative	Home	TV- Laptop	Broadcast	Tradictional TV channels	Subscription/Pay per act	On Demand
Mobile Transition	Outside or mobile	Mobile, PDA	Broadcast	Tradictional TV channels, TV contents adapted to mobile	Free/Subscription/Pay per act	Direct
Mobile PVR	Outside or mobile	Mobile, PDA	Broadcast	Tradictional TV channels, TV contents adapted to mobile	Subscription/Pay per act	On Demand
Killing time mobile	Outside or mobile	Mobile, PDA	Cell	Specific TV contents for mobile (entertainment)	Free/Subscription/Pay per act/on duration	On Demand
The useful mobile	Outside or mobile	Mobile, PDA	Cell	Specific TV contents for mobile (leasures or pro)	Free/Subscription/Pay per act/on duration	On Demand
The mobile 'Game Boy'	Home	Mobile, PDA	Cell	Specific TV contents for mobile (entertainment)	Free/Subscription/Pay per act/on duration	On Demand
TV occupation	Mobile outside	Individual TV screen	Broadcast	Tradictional TV channels, TV contents adapted to mobile	Free/Subscription/Pay per act	Direct/On demand
Collective TV mobile	Mobile outside	Collective TV screen	Broadcast	Tradictional TV channels, TV contents adapted to mobile	Free/Subscription	Direct/On demand

Main schema of mobile TV usage



Revenue share between mobile operators and content providers

	Operator	Content provider
NTT DoCoMo	9%	91%
Telia Sonera	20-65%	80%-35%
Vodafone	40%	60%
Bouygues Telecom	14%	86%
SKT : Free, live TV-to-mobile services	100%	Monthly licensing fees
SKT : Pay TV-to-mobile services ⁽¹⁾	30%	~60%
SKT : VOD services ⁽¹⁾	40%-90%	Programming licence fees

From theory to practice !

- How to use video on mobile to get customer loyalty for a famous brand name?

