

mobilbase mobile a picture !



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The Revolution through Image Content
4 Questions – 4 Challenges

4 Questions



- What made the market changed ?
- Why a success to come ?
- How does it work?
- Where are the challenges ?

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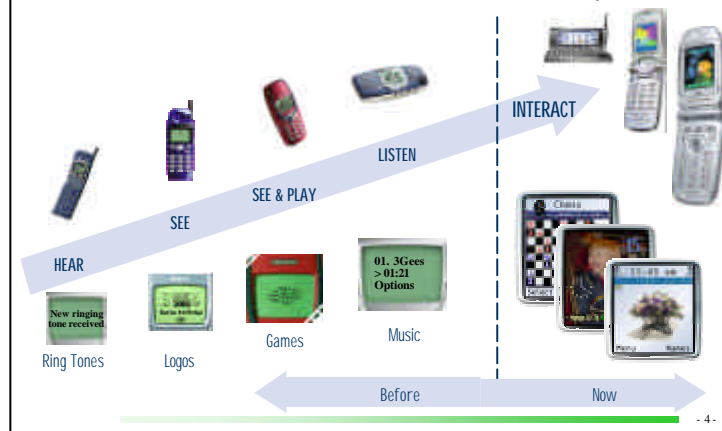
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1- What made the Market changed ?

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New Handsets for New Capacities...



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mobilbase ...and new usages

Talking & Messaging
person-to-person

Sharing
one-to-some

Publishing
one-to-many

Automating
machine-to-machine(s)

Doing Alone

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mobilbase Why image-based services will be a success ?

We identify 5 business drivers indicating why services based on pictures will be a big wave :

- 1- **MESSAGING** : the SMS boom.
More than 1 billion of SMS are sent every day in the world. People are on sending messages.
- 2- **PERSONALISING** : logos and ringtones downloads are skyrocketing.
According to Strategy Analytics, in 2001, 37 million people have downloaded a logo or a ringtone. Since then they must have been multiplied by five.
- 3- **IMAGING** : Digital imaging has replaced paper.
In Europe in 2003, 4 digital cameras are sold for one traditional. In Japan, over 12 million mobile handsets include a camera.
- 4- **E-PICTURES** : everybody does.
Web sites promoting downloads and e-cards sending are flourishing (123Greetings, Hallmarks, etc). In the world, 2 e-cards are sent every second.
- 5- **LICENSING** : artists and Majors are pushing strong.
In music, according to Informa Media, the Authors' societies have received in 2002, €71 millions for ringtones sampling songs or compositions of artists. The royalties represent 8% of this €9,9 billion market (for Europe).

(Source: GSM Association, mai 2002)

(Source: iPhone Update, avril 2002)

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2- Why a success to come ?

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mobilbase An Emerging but Promising Market

The example of MMS :
The inter-personal communication services are getting more and more popular, creating an emerging market in Europe and around the world. SMS is already a success, Wap is coming back with rich content, i-mode is doing well before a full year of activity in Europe and MMS is expected to boost the overall value.

Global Revenues of Communication Services in Europe

(Source: Nokia 2002)

Shares of Revenue of Mobile Multimedia in Europe

Communication Services 80%

Mobile Multimedia 20%

Games & Leisure 26%

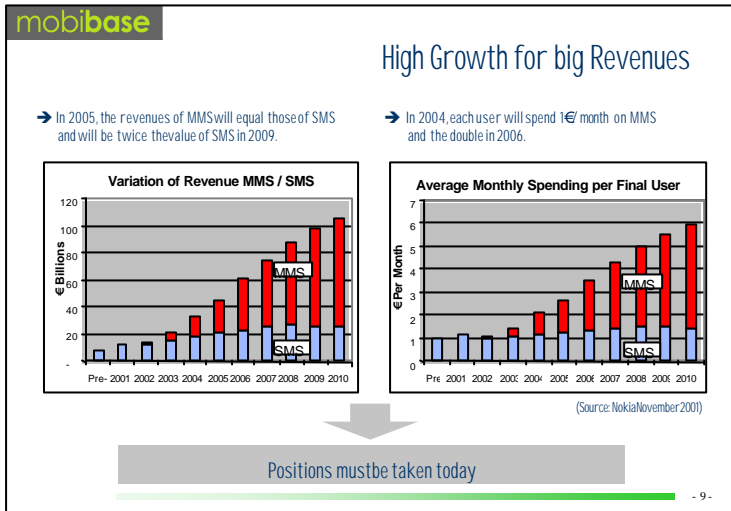
Others 21%

M-Commerce 6%

Downloading of Logos & Ring Tones 47%

(Source: Strategy Analytics, Forrester 2001)

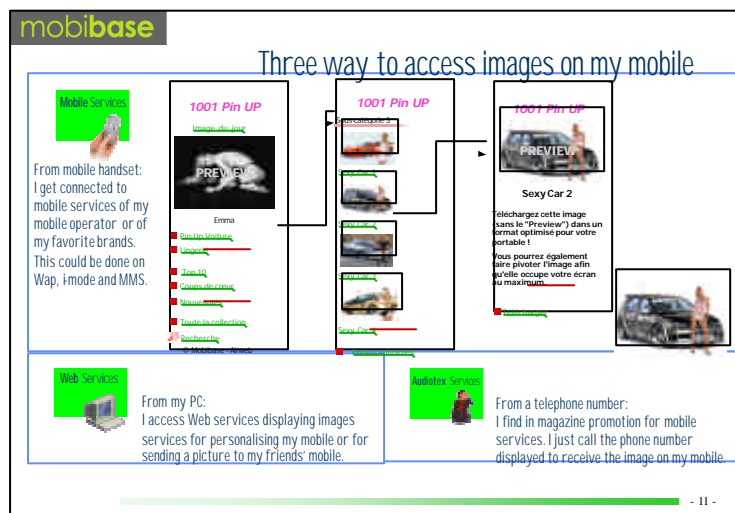
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3- How Does it work ?

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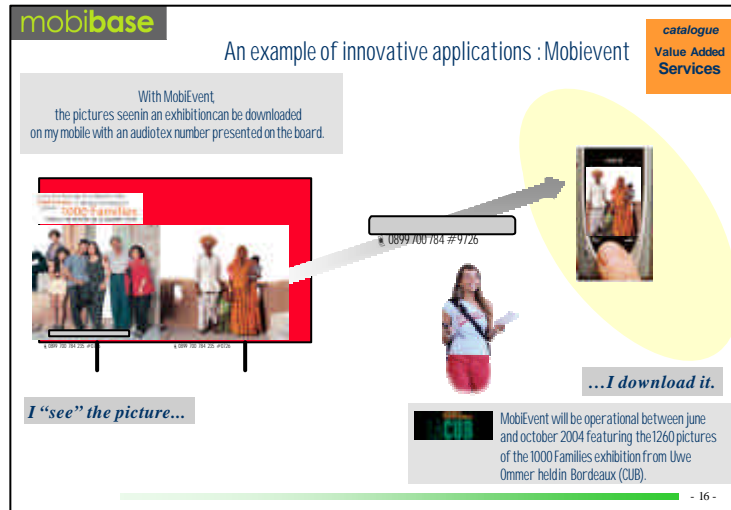
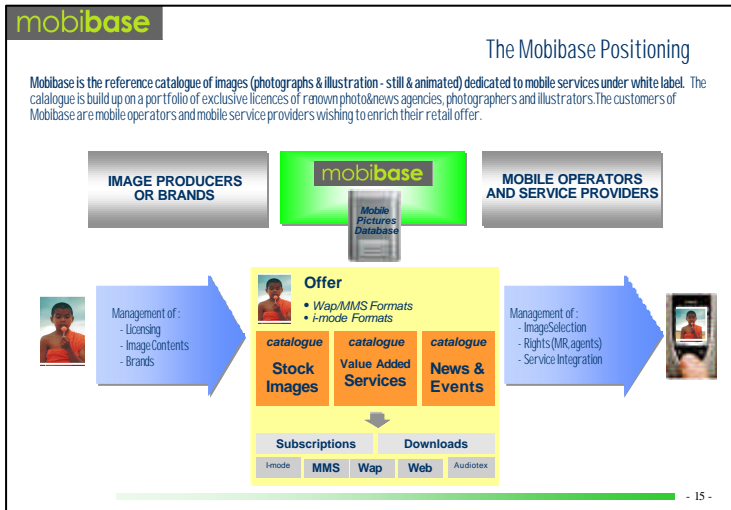
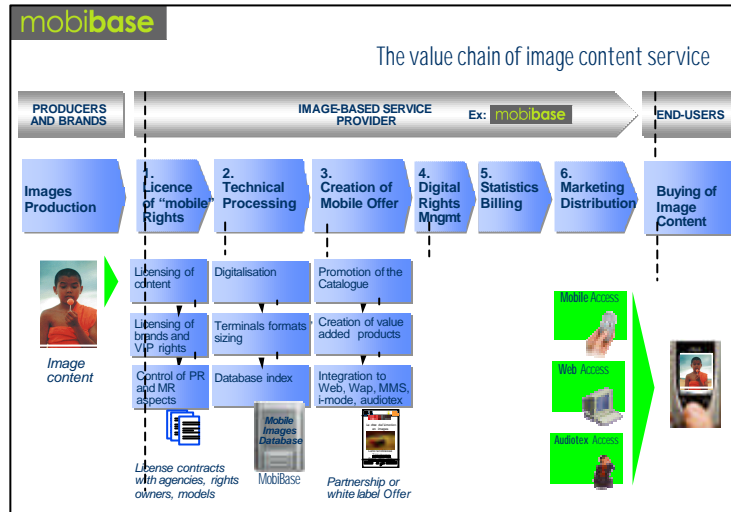
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What else do you do with pictures on mobile?

Post Cards		Animated Logos	
Wallpapers		Video Ring Tones	
Screensavers		M-Promotion	
News		Games	
Videos		Free Content	

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4- Where are the challenges ?



The 4 Mobile Content Providers Challenges



- Licensing
- Technical (from pushing to billing)
- Digital Rights Management
- Innovative Marketing

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Thank You !

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Vincent Roger

Vincent is a specialist of mobile multimedia with a strong licences business experience.

At Present Vincent is the General Manager of Mobibase a reference catalogue of images (still and animated) dedicated to mobile services in white label.

Before founding Mobibase, Vincent was managing mobile multimedia projects for the Telecom Division of CSC Peat Marwick in France. He is the co-writer of « The Marketing of Mobile Multimedia » (ed. Organisation, Paris). Before, he spent six years in Japan as the Business Development Director of a Licensing company.