



J'son & Partners
Management Consultancy

Мобильный контент – на пути слияния с традиционными и Интернет медиа

Москва
Июнь 2008



Мобильный контент это:

- **Очень персональная среда**
- **Устоявшиеся схемы оплаты**
- **Интерес брендов к присутствию в мобильной среде**
- **Инвестиции со стороны традиционных медиа**
- **Сложное отношение к «тяжелому» контенту**

Ограничения:

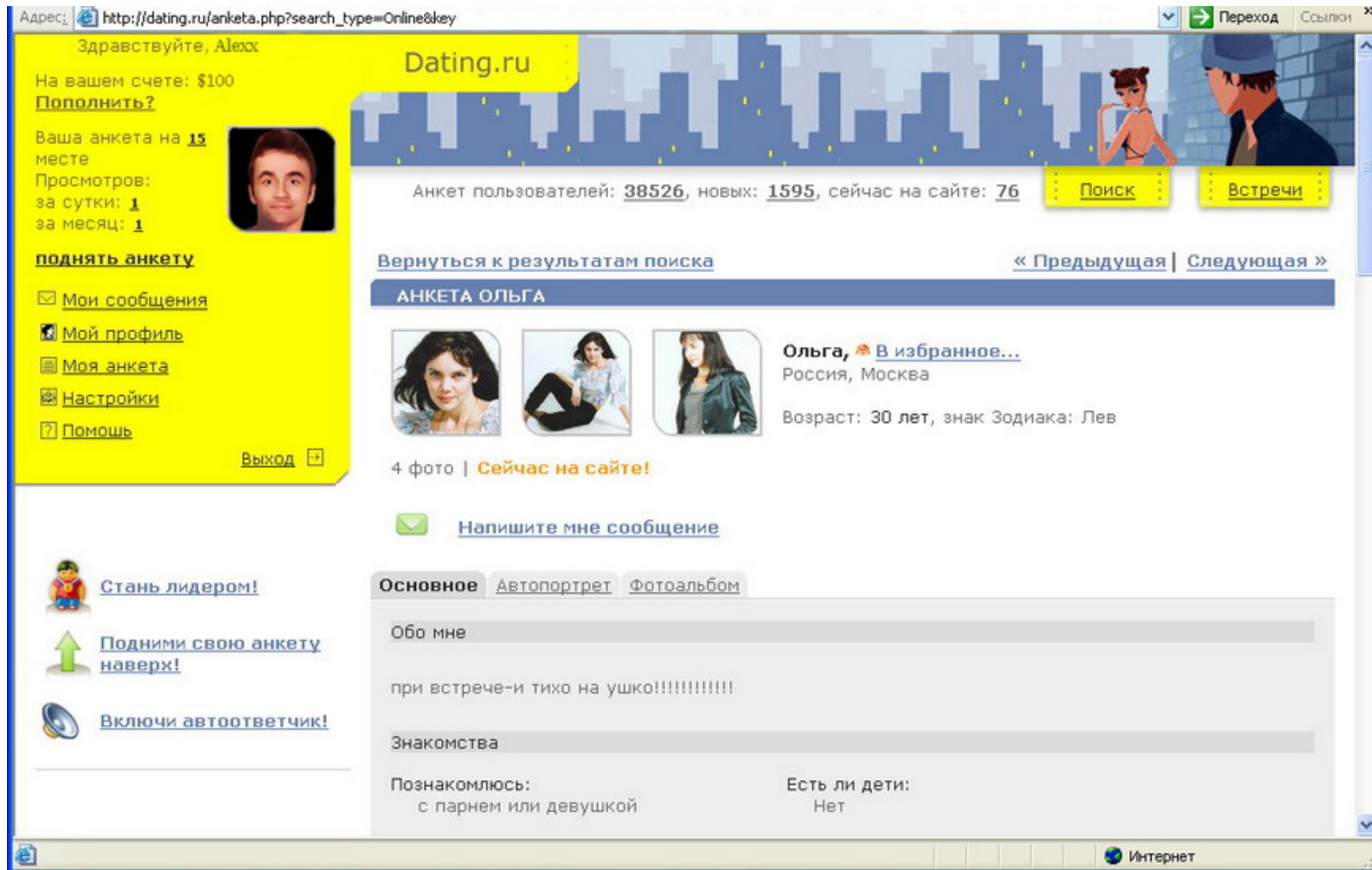
- **Различные спецификации мобильных телефонов**
 - Размер экрана, браузеры, версии Java, ограничения памяти, операционные системы
- **Скорость сети (в реальности – dialup)**
- **Различные бизнес-модели у разных операторов**
- **Ограниченный размер рынка**

Ранние дни web-технологий:

- **Скорость ограничена**
- **Дорогой трафик**
- **Дизайнеры осторожно используют картинки**
- **Веб-дизайн – искусство компромисса**

Похоже на нынешний мобильный интернет, не так ли?

Мобильный контент как add-on для Интернета



Media 2.0

Traditional Media + Web 2.0 + Mobile content

Блоги

Подкасты

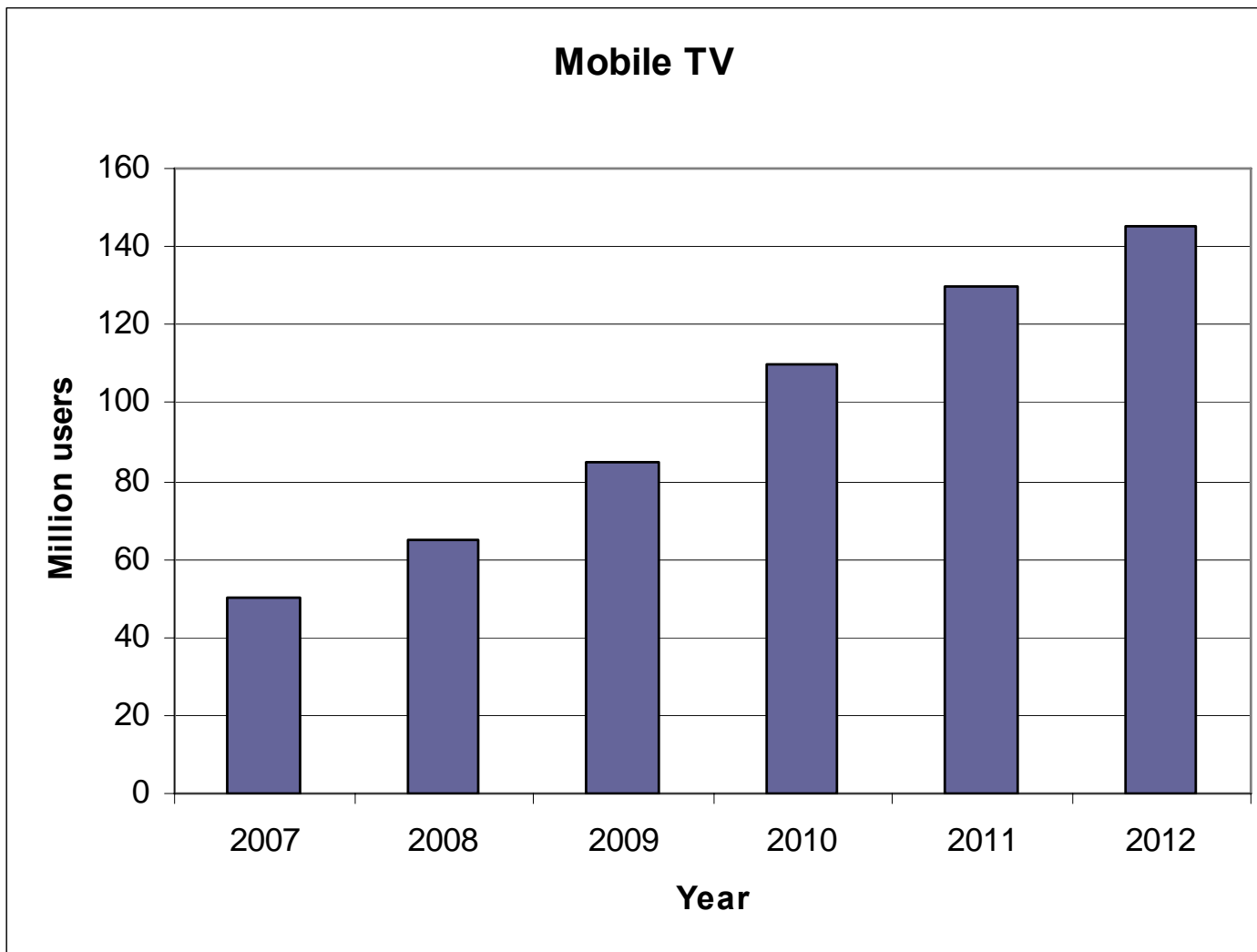
YouTube

Flickr

MySpace

Wikipedia

Last.FM



Мобильный контент влияет на традиционные медиа:

- **Анонсы статей помогают продавать газеты и журналы**
- **Предпрослушивание увеличивает продажи CD**
- **Java апплет как дополнение к печатному изданию (карты, гиды по городу, стране)**
- **Мобильные игры приводят в индустрию PC игр негеймеров (особенно casual games)**

Мобильный контент угрожает традиционным медиа?

- Мобильный контент как дополнение к онлайн/оффлайн контенту
- Традиционные медиа доставляются мобильным путем
- Традиционные медиа становятся интерактивными

Угрозы нет!

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J'son & Partners are “artists in business” as we create innovative and creative solutions for our clients. We try our best to present the minimum necessary analysis and information and to present results in an attractive and entertaining manner.



Clients

Testimonials

Booz-Allen Hamilton
 "Thank you for an excellent job, your consultants showed great competence, flexibility and readiness to help."
 Anna Bykova

3G Association
 "J'son & Partners is a leader in Russian consultancy for 3G and mobile market analysis. J&P is a member in our 3G Association since 2002 and supports the association actively."
 Andrey Skorodumov

Fidel.ru
 "Thanks to J'son & Partners good advice and analysis, I was able to set up my business."
 Boris Gelmov

Intron
 "I requested the global technology markets for us until 2010 and beyond. This analysis was done quickly and with outstanding quality and at a good price."
 Vladimir Vasilyev

Telenor
 "Your recommendations show a very good understanding of the current regulatory situation."
 Yngve Haeroid

AFK Sistema
 "Your team showed a very good understanding of the market. A very good job."
 Oxana Kovalevskaya

OPIC
 "Thanks very much. I appreciate all the hard work you and your colleagues made on this project."
 Richard Greenberg

Tudno Sutton
 "For several years, I have tapped into J'son & Partners analysis and industry insight, and I and my teams have always been very impressed with the quality of J&P's work."
 Peter Owen-Edmunds

More than 250 Clients

JP Capital clients reads like who-is-who in Russian telecom, IT and media. We focus on all existing and new segments of interest for our clients.

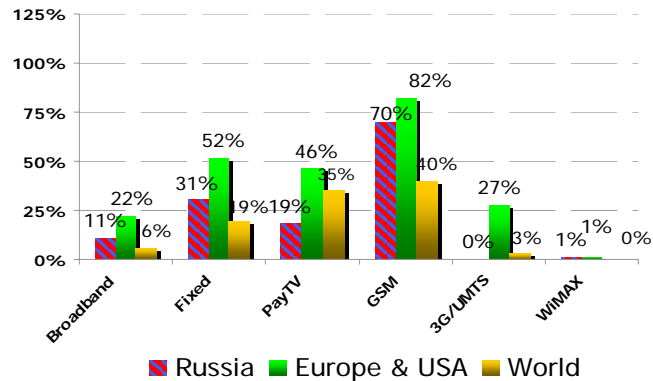
Russian Market will double by 2012

DIDNCIT* Market by 2012

Market Size, \$ Bln	2005	2006	2007	2010	2012
IT	13	17	21	30	38
Cellular	10	14	20	31	39
Fixed & Wireline	8,1	9,8	12	15	18
Digital Content	1,3	1,7	2,5	4,8	7
Broadband	0,9	1,4	1,9	3,5	4,6
New services	0	0	0,8	13	16
Total	33,7	44,3	57,7	97,2	122,6

J&P covers 100 Market Segments

**Great potential for all market players
(penetration rates 2007)**



Data Clusters

- Radio
- Print Media
- Entertainment
- Content Production
- Digital Cinema
- Mobile WiMax
- DVB-T
- DVB-H
- PC Gaming
- Publishing
- Smart phones
- Film Production
- BWA
- Equipment
- IT
- Outsourcing
- Video Services
- Social Networks
- Corporate BB
- Residential BB
- Fixed Telecom
- Local Voice
- LD Market
- Terrestrial TV
- Pay TV
- TV Packaging
- WiMAX
- Cellular
- PCs
- IPTV
- Other
- Online Gaming
- Macro
- Field Data
- Gaming
- Inter...

Market Segments

- Broadband
- Telecom
- Television
- WiMAX
- Cellular
- Ad-hoc Data
- Macro Data
- Field Researches
- Digital Content
- Other
- Other
- Other
- Other

Clients focus on Vertical Segments

* Digital Information, Devices, Networking Communications, and Information Technologies



JP Capital

Outstanding Business Solutions is our routine...

we make prospective businesses grow

We propose Operators and Investors:

- Fund Raising
- Mergers & Acquisitions (Buy and Sell Mandate)
- Financial Modeling
- Business Planning
- Strategy Development
- Business Valuation
- Due Diligence

We cover many Market Segments:

- Broadband
- Triple Play
- WiMAX
- CLEC
- On-line Gaming
- Internet Portals
- IT Integrators
- Cable TV
- GSM /CDMA
- 3G
- MVNO
- Data-centers

Russia, Central Asia and Eurasia



Press Release

Private Equity Fund Volga River One Capital Partners Invests in WiMAX technology

PE Fund Volga River One CP has closed the deal to acquire a blocking stake in MetroMAX Group – WiMAX operator in Samara region. The fund has an option to increase its stake to 49.6%. The proceeds will be predominantly used for company's planned expansion.

Since 2006, the MetroMAX Group operates on the fast growing market of broadband telecom services and based on WiMAX protocol. The network covers Samara, Samara region, Ulyanovsk; base stations are being deployed in Orenburgh and Saratov, and the network will also expand to a smaller cities and towns. The company has a large portfolio of frequencies and is licensed to provide broadband WiMAX services in twenty key regions of Central and Southern Russia

NRG, representing the fund in this deal, will appoint its member to the company's board of directors and will be closely involved in strategic and operational decision making. Andrey Dobrynin, Managing Partner of NRG, said commenting on the deal: "We believe in the future of WiMAX as a technology. Also MetroMAX has a great team: we had a pleasure of working with them for the past few months"

"J'son & Partners congratulate both parties to successful conclusion of the transaction. We believe that there is scope for MetroMAX to become a leading regional operator and the investment by Volga River One Capital Partners is a great vote of confidence for the WiMAX business model in general and for MetroMAX in particular" says J'son & Partners Managing Partner Karl Johannesson.

According to J'son & Partners estimates the market volume of fixed line WiMAX in Russia in 2007 was US\$ 55-60 m and the market is expected to grow rapidly. Among other wireless technologies WiMAX has advantages of longer range of up to 30 km from base station with a speed of 10Mb/sec.

General Director of MetroMAX, Sergey Schvaikin said: "Our strategy is regional expansion to cover smaller cities and towns of Central and Southern Russia. The fund's participation will not only help us expedite our progress with additional investments, but also build modern, transparent and investor-friendly company. We view NRG as a partner and an adviser"

Спасибо за внимание!

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