

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

The screenshot shows a mobile browser window displaying the [Dating.ru](http://dating.ru/anketa.php?search_type=Online&key) website. The address bar at the top shows the URL [http://dating.ru/anketa.php?search\\_type=Online&key](http://dating.ru/anketa.php?search_type=Online&key). The main content area displays a user profile for 'ОЛЬГА'. On the left sidebar, there are links for 'Мои сообщения', 'Мой профиль', 'Моя анкета', 'Настройки', and 'Помощь'. Below these are icons for 'Стань лидером!', 'Подними свою анкету наверх!', and 'Включи автоответчик!'. The main profile page shows a banner with a city skyline and two cartoon figures. It displays statistics: 38526 users, 1595 new users, and 76 users online. Navigation links include 'Поиск' and 'Встречи'. Below the banner, there are three small profile pictures of 'Ольга'. The profile details show 'Ольга, В избранное...', 'Россия, Москва', and 'Возраст: 30 лет, знак Зодиака: Лев'. A message box says '4 фото | Сейчас на сайте!' and 'Напишите мне сообщение'. At the bottom, tabs for 'Основное', 'Автопортрет', and 'Фотоальбом' are visible, along with sections for 'Обо мне' (with the text 'при встрече-и тихо на ушко!!!!!!!') and 'Знакомства'. Other fields include 'Познакомлюсь: с парнем или девушкой' and 'Есть ли дети: Нет'. The bottom right corner of the browser window shows the word 'Интернет'.

# Media 2.0

**Traditional Media + Web 2.0 + Mobile content**

**Блоги**

**Подкасты**

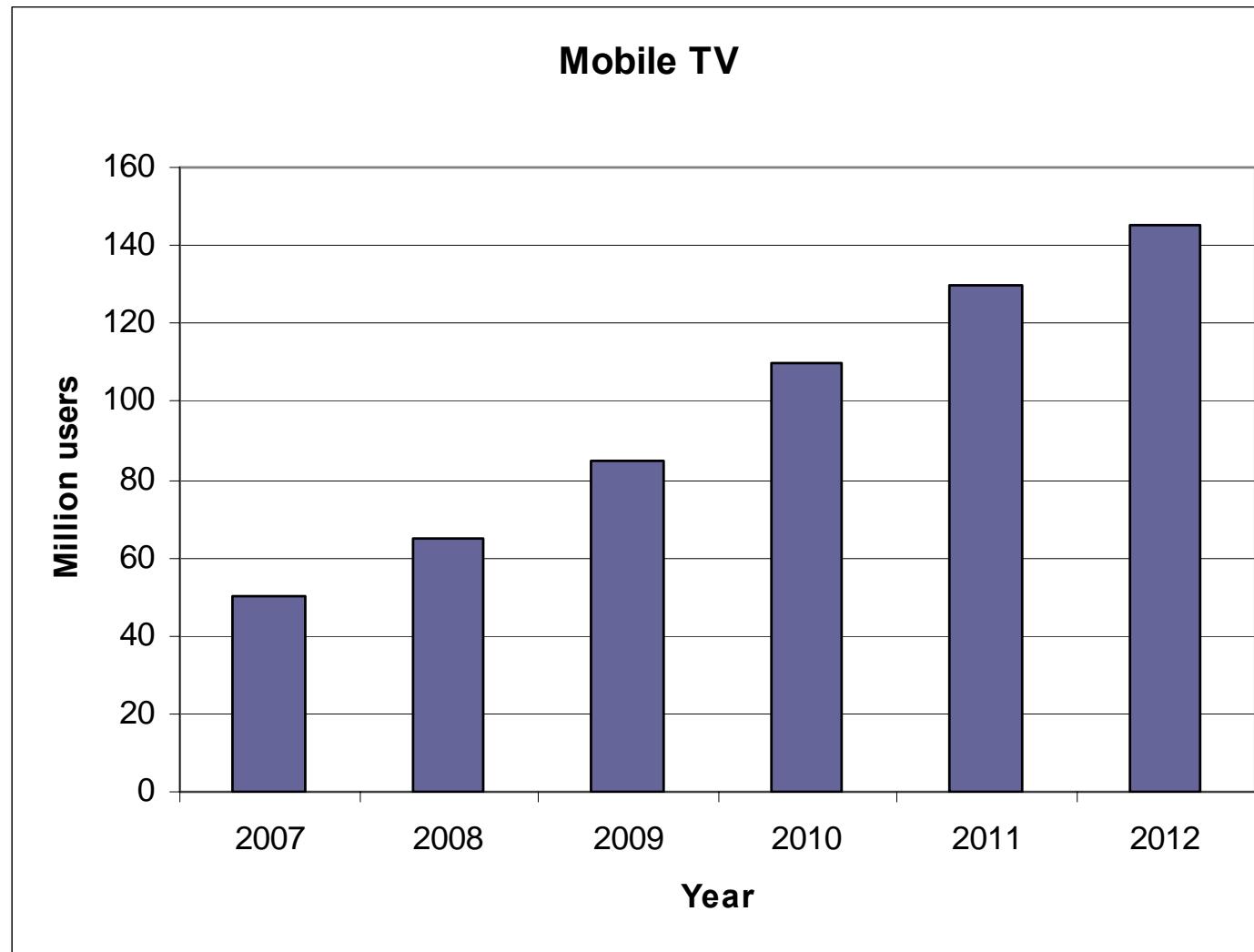
**YouTube**

**Flickr**

**MySpace**

**Wikipedia**

**Last.FM**



# Мобильный контент влияет на традиционные медиа:

- Анонсы статей помогают продавать газеты и журналы
- Предпрослушивание увеличивает продажи CD
- Java аплет как дополнение к печатному изданию (карты, гиды по городу, стране)
- Мобильные игры приводят в индустрию РС 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!**



**About Us** **Services** **Reports & Databanks** **Clients** **Special Offers** **Price List** **Become a Partner** **Jobs** **Countries** **Contact Us**

**Consultancy Services**

**Investments Business Plans**

**We are proud of our ability to quantify and predict**  
More clients have benefited from our ability to advise the best timing for any strategic business decision

**Client Login**

**Latest**

## J&P Consultancy

More than 1,000 clients have already used our consultancy for more than 40 country markets. Click here to find out why.

## J&P Capital

If you need the best Business Plan and Financial Models done in the shortest time and at the lowest price - here is where you should start.

## J&P Connect

Connect to our know-how platform and let us do the work for you in a new and innovative way. We offer new business connections and much more.

© 2007 J'son & Partners. All rights reserved.

[Legal disclaimer](#) & [Privacy policy](#)



**J'son & Partners**  
Artists in Business

**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.**

# 250 Clients for Projects, Reports & Databanks



**Билайн**

**МТС**

**Мегафон**

**LG**

**Golden**

**Google**

**intel.**

**Евросеть**

**BRITISH COUNCIL**

**ВОЛГАТЕЛЕКОМ**

**ITOCHU**

**HTK**

**warner music group**

**Проф Медиа**

**Яндекс**  
Найдётся всё

**NASPERS**

**Уралсвязьинформ**

**JPMorgan**

**European Commission**

**telenor**

**Sony Ericsson**

**БЕТАЛИНК**

**TRAFFIC CARD**

**amedia**

**IN PULSE**

**СРОЧТЕЛЕКОМ**

**European Bank for Reconstruction and Development**

**KazTransCom**

**MOTOROLA**

**WEB plus**

**SKY BANK**

**Мобильные ответы**

**SAMSUNG**

**СИСТЕМА**

**NOKIA**  
Connecting People

**NEC**

**AMT GROUP**

**@mail.ru**

**EXPORTRÄDET SWEDISH TRADE COUNCIL**

**СВЯЗЬ ИНВЕСТ**

**ГАЗПРОМ-МЕДИА**

**SONY BMG MUSIC ENTERTAINMENT**

**ACCESS INDUSTRIES**

**European Investment Bank**

**Укртелеком**

**SUMITOMO**

**unitline**

**Deutsche Telekom**

**MetroMAX**

**МТС**

**telecom EXPRESS**

**JETRO**

**адриша**

**ENTERPRISE IRELAND**

**Booz | Allen | Hamilton**

**THE SPUTNIK GROUP**

**<суп>**

**Mitsui**

**NORTEL**

**smx.com**

**TELE2**

**THALES**

**AI**

**СОЛНА**

**COMSTAR**

**Deloitte.**

**&fgroup**

**ISKRATEL**

**Rambler**

**SIEMENS**

**bercut**

**КОМСОМОЛЬСКАЯ ПРАВДА**

**STELT TELECOM**

**Fleming Family & Partners**

**CABLE & WIRELESS**

**LE GOUVERNEMENT du Grand-Duché de Luxembourg**

**sum**

**PricewaterhouseCoopers**

**BIPS**

**CISCO**

**More than 250**

**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 Chikov

**Intron**  
"We utilized the place 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 Haereid

**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

**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.**

J'son & Partners

Загружено с Procontent.ru

Page 11

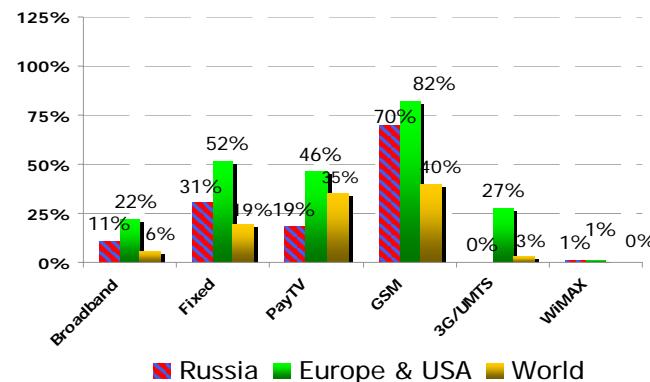
# Russian Market will double by 2012

## 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

Ca

## 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 Orenburg and Sosnovo, 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 Dobrynnin, 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\$ 55.50 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!

**Дмитрий Мартемьянов**  
**Директор JP Consulting**

[dmartemianov@json.ru](mailto:dmartemianov@json.ru)

**Телефон:**    +7 (495) 625 7245  
                  +7 (495) 625 9177