



Outsourcing beyond Partnership

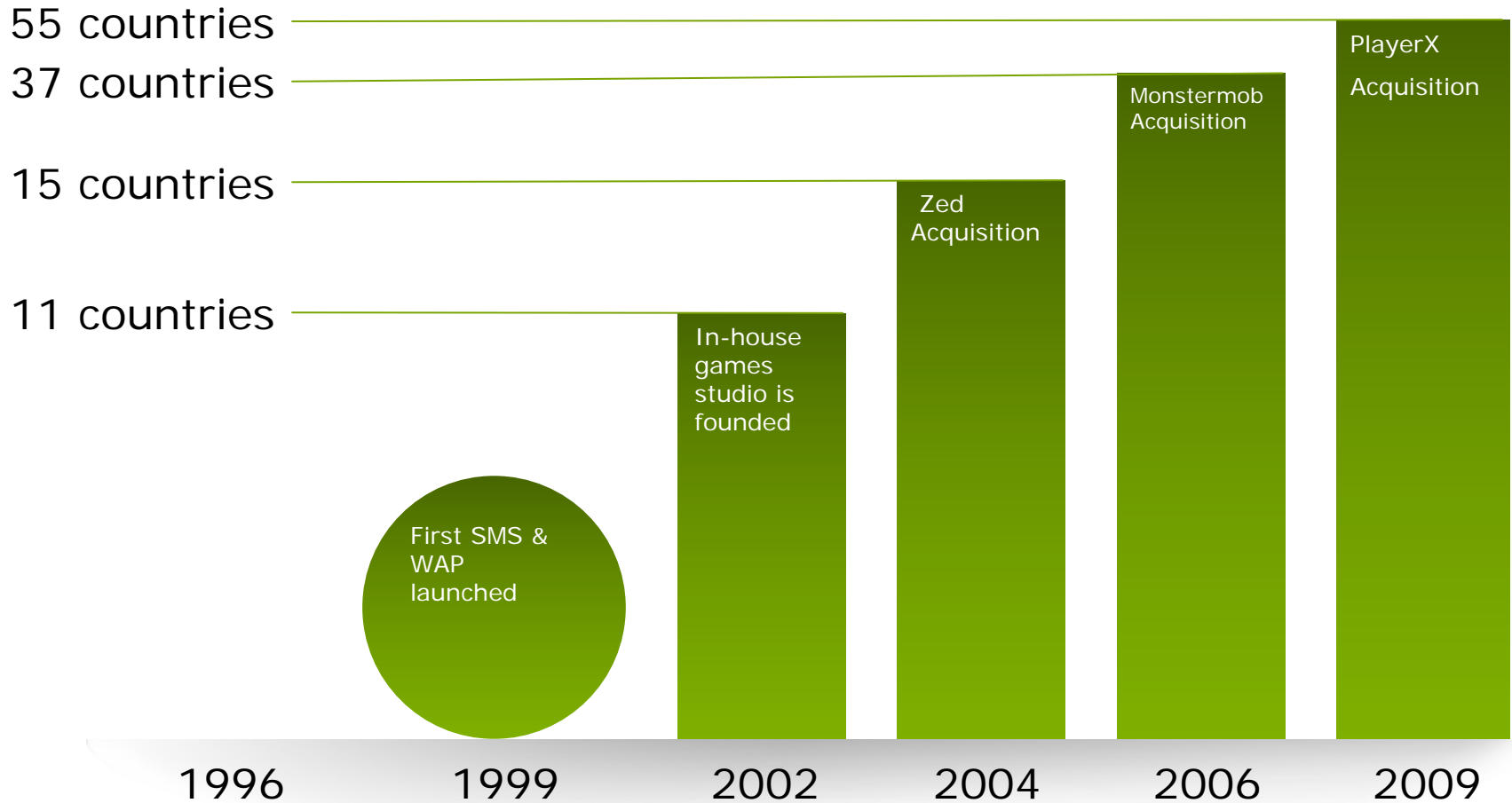


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Zed at a glance

- **Leadership:** #1 company in the Mobile Value Added Services industry
- **Experience:** +10 year experience in the digital entertainment industry
- **Global geographical footprint:** operations in **55 countries in 5 continents**, through agreements with **130 mobile networks**. Offices in 22 world capitals.
- **Dedication:** 2,000 employees worldwide. 50% dedicated to R&D and innovation
- **Extensive portfolio:** **170.000 SKUS** of mobile content products and services (personalization, games and applications)

10+ years of experience in the digital entertainment industry



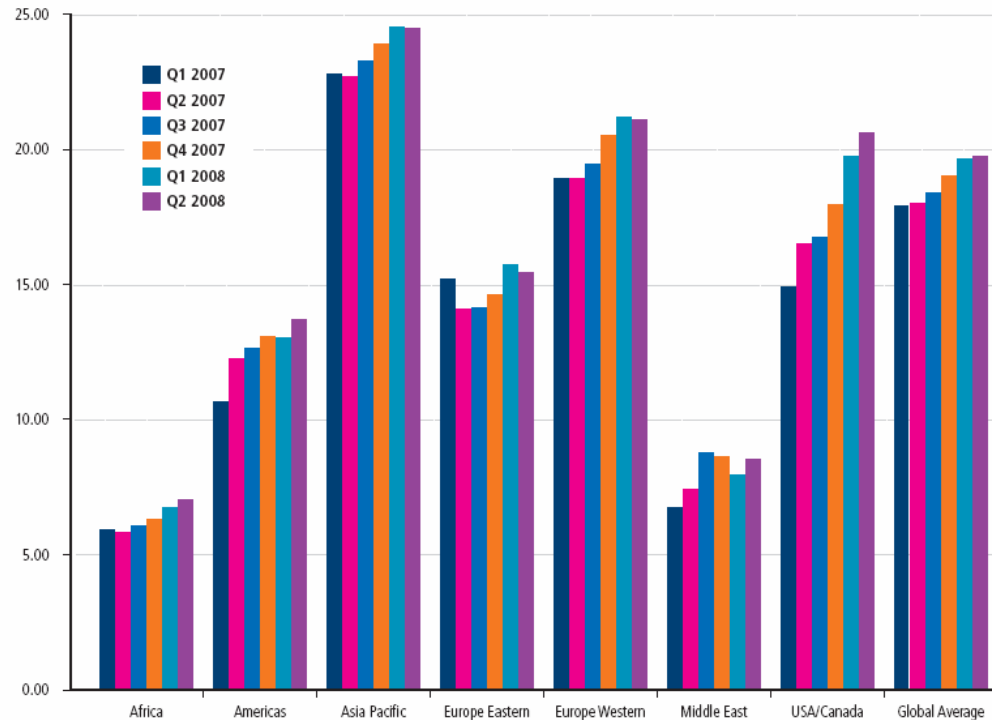
Mobile Content

Mobile content market

Entertainment, Information
Personalization, Music, Videos,
Games, News
Non-messaging data services

- \$ 200 billion in 2008
- 35% Growth (2008 Vs. 2007)
- Non-SMS services generating up to 50% of non-voice revenue (Vodafone Europe in 2008)

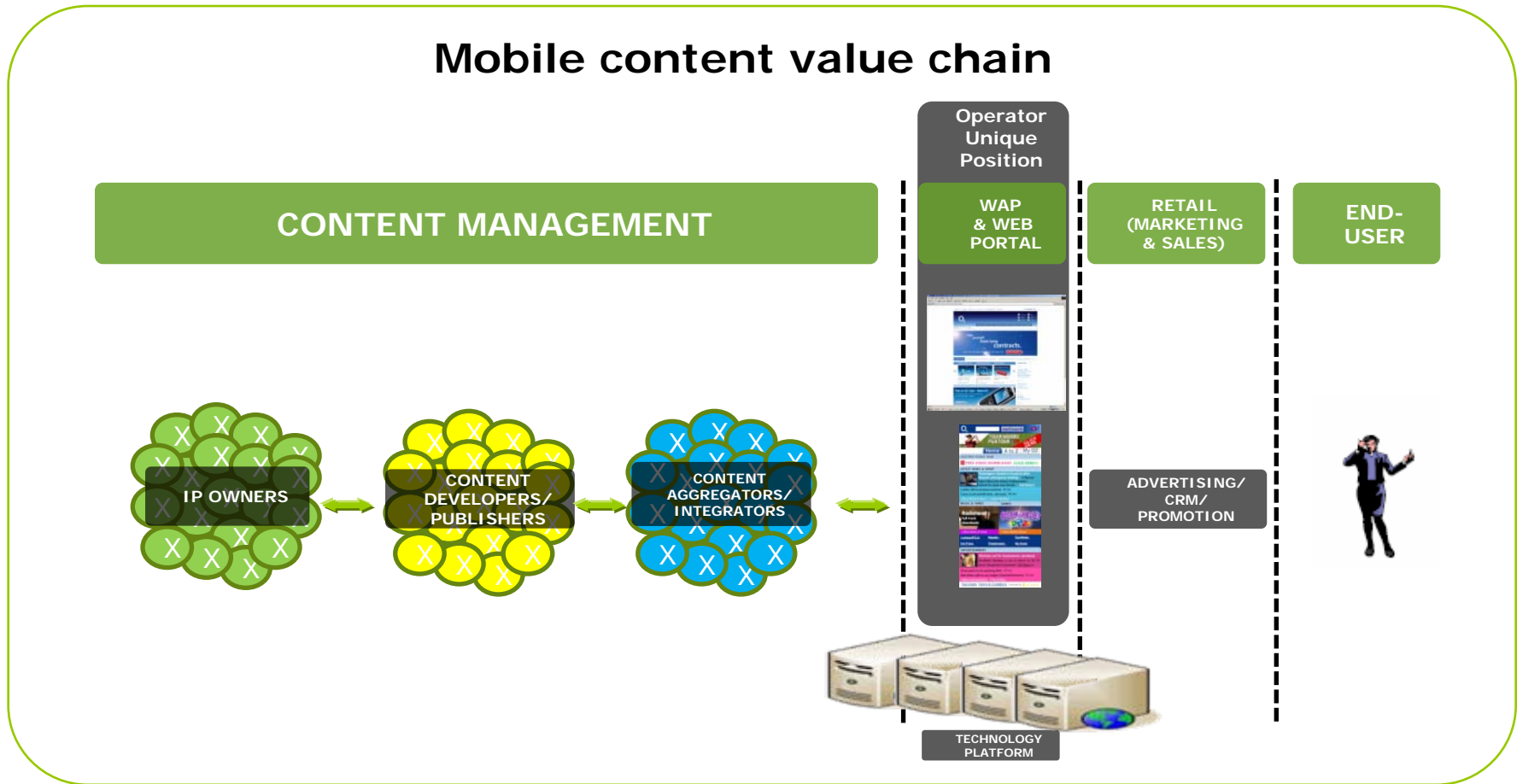
Data as %
of total revenues



Source: Netsize guide 2009 – Informa Telecoms & Media

A steady increasing Market

Operator and mobile content market



Increasing market and unique position controlling access to end-user

BUT...

Operator and mobile content market

- **Not traditional core business**
- **Tough competition** from off-portal players
- Operating a portal with various services is **complex** and requires **a lot of dedicated resources** in terms of:
 - **Content portfolio management** (relationship with different licensors, publishers, aggregators)
 - **Marketing & Sales efforts**
 - **Technology platform**

Solution?

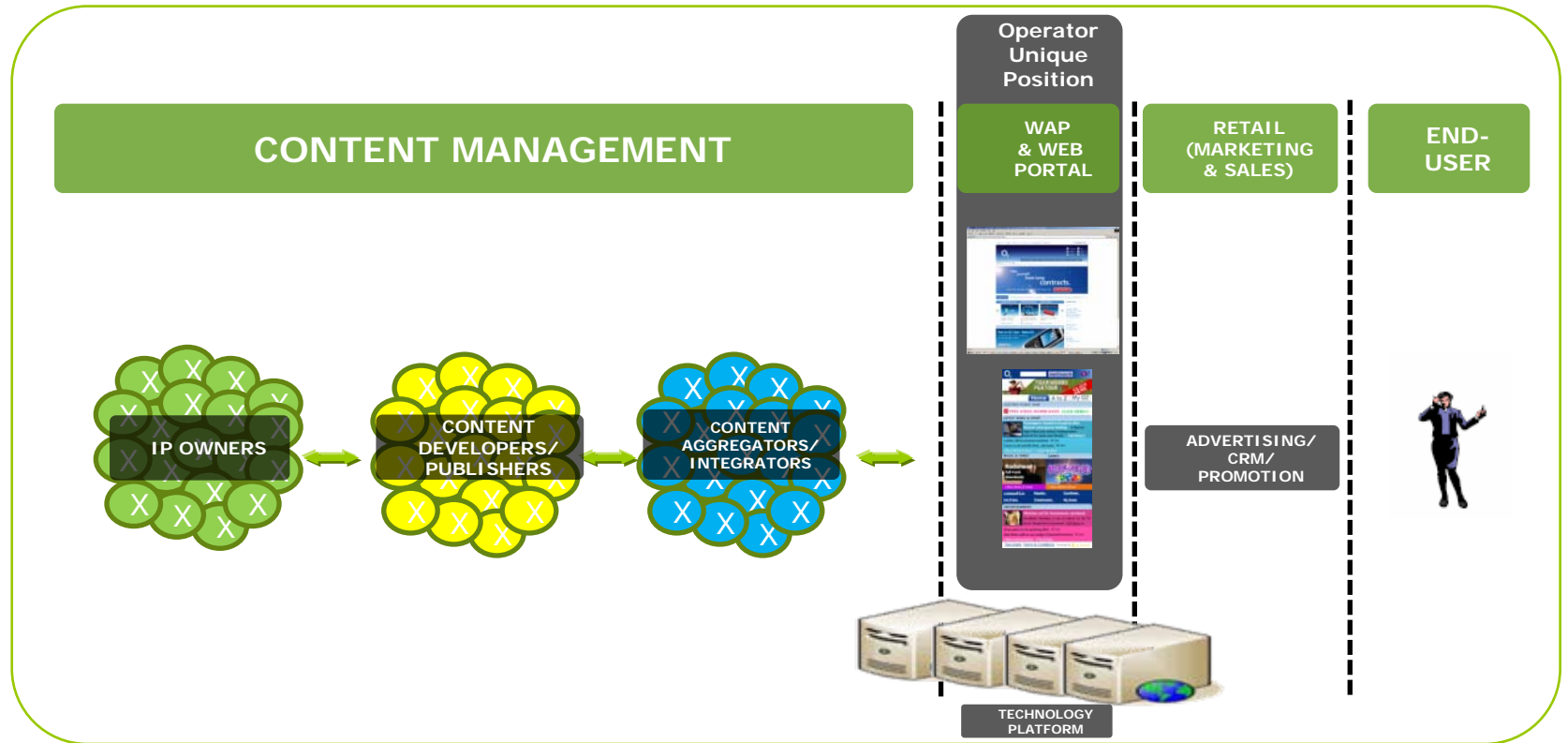
Master

Service

Content

Provider

MSCP Solution



OPERATOR + MSCP PARTNERSHIP

FULL END TO END SOLUTION

COST EFFICIENCY + REVENUE INCREASE

Full End to End and Flexible **Service Solution**

Customization to meet every specific need

CONTENT MANAGEMENT

- Portfolio optimization
- Content Providers Management (commercial agreements/Licensing, content submission, sales reports)
- White Label content: In-house production capacity (all categories)
- Own IP and content catalogue

PORTAL MANAGEMENT

- Front-end Multi-Channel Management (Wap, Web, SIM Browsing)
- Full categories management (Personalization, Music, Videos, Games, News)

RETAIL MARKETING & SALES

- CRM & Mobile Marketing campaign optimization tools
- Full range of Business Models (Pull, Push, Rental, Pack, Trial)
- Detailed Stats & Business reports
- Advertising Management (Banners display)
- Customer Care

TECHNOLOGY

- Multi Service Delivery Platform (Wap, Web, SMS Premium, SIM browsing)
 - Connectivity & Billing Management Platform
 - Front-end & Back-end Management

The MSCP benefits for an operator

Improve Cost Efficiency

- Turn Key solution for content/portal management and technology
- Centralization: one agent to deal with all content providers
- Unified billing system
- No technology investment and maintenance cost for operators

Maximize Revenue

- Harmonization of sales channel: no repeated content and services
- Content Portfolio Optimization (selection and update)
- Increased bargaining power with content providers
- Marketing/CRM: acquisition and retention of customer
 - Cross / Up-Selling

Experience

MSCP PROVEN EXPERIENCE

- Customized solutions implemented across the world for operators with different requirements and specificities
- Telefonica MSCP in 12 LATAM countries, all categories
- O2 UK 100% Mobile Game Store Front
- Vodafone Global Official Games aggregator in 12 countries
- Orange World Official games aggregators in 7 countries
- AT&T USA official major label aggregator



CONTENT SALES EXPERTISE OWN D2C OFFER

- 10 year experience in the MVAS Sector
- Strong D2C offer and International presence: 11 brands across 44 countries
- Understanding of customers needs (local flavour and global trend)



LEVERAGING PARTNERSHIP

- Our goal is to provide an efficient service to all our partners (from content providers to the operator) to optimize each partner benefit
- Collaboration with High Profile partners (from IP owners to Content providers)





Thank you

