

More Media. More Mobile. More You.

Enabling Mobile Broadcast Media Success

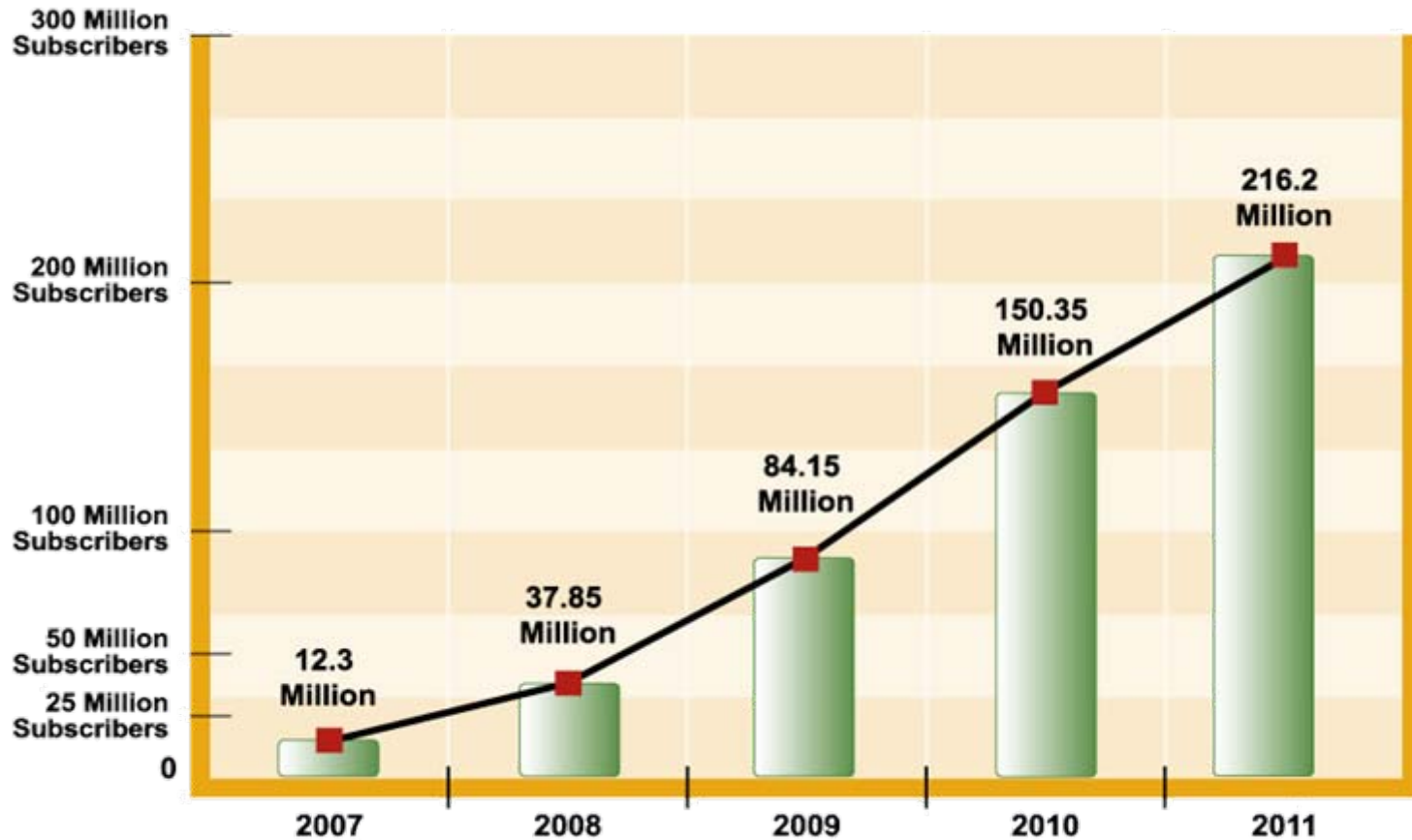
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The Overall Business Opportunity



Worldwide mobile TV subscribers slated to expand

Estimates from ABI, Informa, In-Stat, iSuppli, Datamonitor, NSR, Strategy Analytics, IMS Research, Mobile Youth, eMarketer, and Juniper. Compiled and combined by Robert Hale & Associates, 10/2006.

Enabling a Rich and Successful Worldwide Mobile TV Business

Commitments:

- The long term success of a worldwide mobile TV market
- Superior technology as an enabler
 - More channel capacity for pay TV and additional premium revenues
 - Sharp cut in CAPEX and OPEX
 - Outstanding Quality of Service
- Help each market develop and implement the appropriate business model

Recommendations:

- Rich content and top quality mobile TV experience is a must
- Smooth and easy access to TV and handoff to 3G services
- Quality mobile TV and compelling interactive services as a strong ARPU enhancer

Success Criteria for Mobile TV

- Robust, reliable, and inexpensive handsets
- Excellent Quality of Service
 - Coverage
 - Content: quality, diversity, and number of channels
 - Service acquisition and channel switching time
 - Handset viewing autonomy
- Flexible and segmented mobile TV offer
- Continuous service innovation
 - Sustained investments
 - Appropriate business models



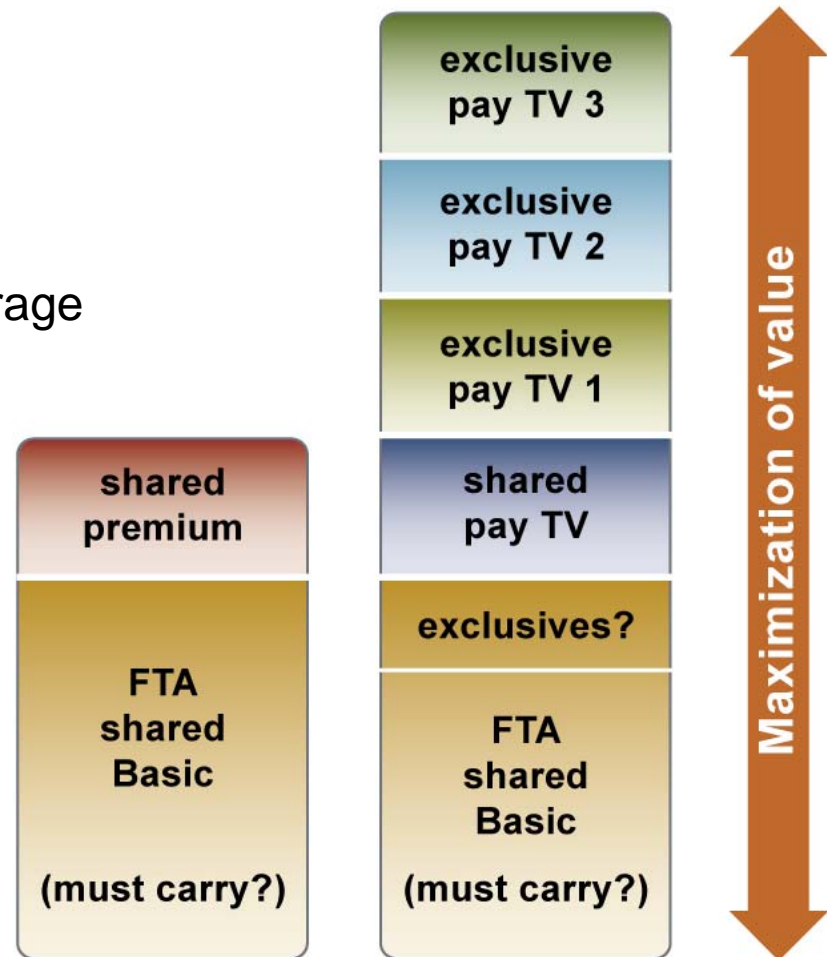
The Value Chain

- Content and service editors
- Channels
- Mobile broadcast service operator (pay TV)
- Mobile network operators
- Advertising agencies
- Technical and technology suppliers (Technical broadcasters, chip vendors, etc.)

The Mobile TV Service Channel Lineup – The Virtuous Circle

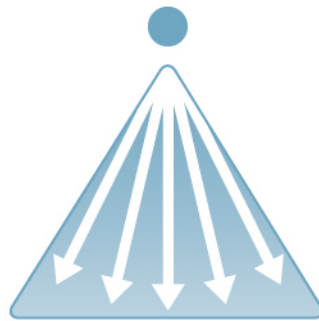
Business Adjustment Factors

- Coverage / marginal costs
- Segmentation / adoption / revenues
- Content sourcing and purchase leverage
- Penetration / advertising CPT
- Penetration / advanced services



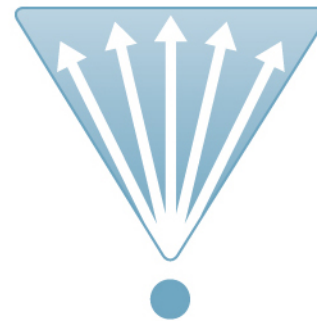
More Services – Stimulating Transactions via Broadcast

Broadcast Network



Trigger

Mobile Network



Action



- Convert a sports fan to a data user → check score/player stats
- Convert a voice subscriber to a data user → voting and response
- Convert a passive user into an active one → social network applications

Thank You!

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