

Mobile Content Strategies & Business Models Scenarios & Forecasts 2008-2013

This second edition strategic report investigates the current and future market opportunity for mobile content dissemination in three key scenarios; Smart Pipe, Dump Pipe and On-Portal providing six year forecasts for eight key regions under each scenario.

For the Smart Pipe scenario it discusses how the network operators will benefit from increased levels of traffic and how third parties and billing service providers will have a much smaller part to play. For the Dumb Pipe scenario the report considers the impact of effectively all retail revenue from mobile content going to the content provider. For the On-Portal scenario, the report discusses the operators gaining all mobile content revenues, but also having to shoulder all costs for content acquisition, marketing/placement and billing.

Crucially, this report considers Apple's 'Apps store' model and sets this in context with the three scenarios discussing the various drivers/constraints as well as providing forecasts until 2013 from the most recent ARPU figures available, split by voice and data.

Key Questions Addressed by this Report:

- What are the present constraints placed on mobile content uptake/usage?
- Why are MNOs not adequately promoting availability/usage of mobile content on their networks?
- What is the global mobile content market worth and how will it grow over the next five years?
- Which business models will help all players maximise their returns on mobile content provision?
- What is the Dumb Pipe and why should MNOs strive to move away from this situation?
- What is the Smart Pipe and why should MNOs want to become Smart Pipes?

Key Benefits:

- A unique source of combined research and analysis for the business models for mobile market including technologies, market characteristics and forecasts.
- Practical analysis of emerging opportunities for vendors & operators.
- Unique insights: includes interviews of leading players with significant experience of the business models market.
- Benefit from fresh thinking and intelligent market assessment.

A circular badge with a purple gradient background and a white border. The text "Free Telecoms whitepapers" is written in white, with three small white dots below it.

Mobile Content Strategies & Business Models: Analysis & Forecasts

report overview

The report is vital for all mobile operators, content providers, aggregators, billing companies and settlement service providers hoping to maximise revenues from mobile content business modelling. It also provides company profiles of the different types of key players involved in the market. This report projects how revenues derived from mobile content will be shared by three types of player; mobile network operators (MNO), content providers and third parties. In addition, the report forecasts – on both a global and regional basis – how each player will see their mobile content revenues grow under each of the three scenarios. Underpinning the forecast is Juniper's subscriber growth forecast determining the rate of growth.

analysis & forecasts

Report Analysis

6 Year Analytical Forecasts provide an extensive market breakdown for mobile content subscribers and revenues by non-messaging, scenario/type of player and region until 2013.

Split by 8 Key Regions North America; South America; Western Europe; Eastern Europe; Far East & China; Indian Sub Continent; Rest of Asia Pacific and Africa & Middle East.

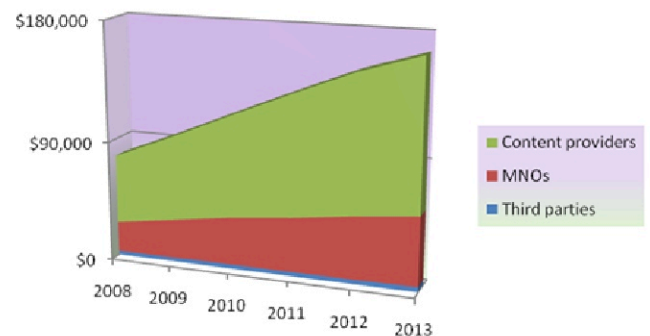
Understanding Market Mechanisms piecing together the influential dynamics for market development, including: mobile content value configurations; business, revenue and profit models; and key player case studies and real world scenarios.

Visual Clarity with 74 tables and colour forecast charts.

Market Forecast Suite 2008-2013

Mobile Content Revenues total annual data; non-messaging: person-to-person mobile data; total (end-user generated plus adspend); non-messaging (distribution) by category of player (Dumb Pipe; Smart Pipe; On-Portal); net revenues by category of player (Dumb Pipe/Smart Pipe/On-Portal scenario) for N/S America; W/E Europe; Far East and China; Indian Sub-Continent; Rest of Asia Pacific; Africa & Middle East

Non-Messaging Mobile Content Revenue Distribution, Smart Pipe Scenario 2008-2013 (\$m)



Mobile Content Subscriber ARPU per subscriber (split by voice/data)

Cellular Market Growth global subscriber growth; subscriber base; global 3G subscriber; subscriber by technology

our background

Juniper Research specialises in providing high quality analytical research reports & consultancy services to the telecoms industry. We have particular expertise in mobile, wireless, broadband & IP-convergence.

Juniper is independent & provides authoritative assessments of markets, technologies & industry players. Our analysts are experienced senior managers with proven track records in each of their specialist fields.

Each report is thoroughly researched, intelligently written & proof-read by qualified experts prior to publication. The report offers a rich mix of graphics, illustrations, technology roadmaps and tables.

our clients include...

AOL • Associated Press • BitFlash • Boston Consulting • Group BT • Canon • Cingular • Cisco • Comverse • Digiquant • Electronic Arts • EMI • Ericsson • ESPN • ETRI • Excurro • Financial Times • First Data Corporation • France Telecom • Goldman Sachs • Hutchinson • IBM • Icefyre • Infospace • Intel • KG Partners • Korea Telecom • Logica CMG • Lucent Technologies • Microcell • Microsoft • Morgan Stanley • Netro • Nokia • NTL • NTT DoCoMo • Openwave • Orange • Panasonic • Philips • Qpass • Qualcomm • Redline Communications • Scientific Games • Seiko • Siemens Mobile • Synaptics • TDK • Vivendi Universal • Vodafone

www.juniperresearch.com

Dumb Pipe

On-Portal

\$

Smart Pipe

Executive Summary

1. Mobile Content Value Configurations

The Mobile Content Value Chain

- Defining the mobile content value chain; A linear approach to delivery is inadequate

Key Success Elements for Value Configurations

- Roles and responsibilities; Partnership management; Interoperability

Mobile Content Players

- Types of player; Customer ownership

Value: Contradictory Views; MNOs Unable to Follow Consumption Patterns

2. Mobile Content Business Models

Business Model Fundamentals

- A new approach

Business Models: The Basics

- Brokerage; Infomediary; Merchant; Direct-to-consumer; Outsourcing; Advertising

Wholesale Business Models

- Wholesale helps fixed revenues grow - what about mobile?; Reversing mobile revenue decline; Value-added wholesale can help; Three types of value-added wholesale services

3. Mobile Content Revenue/Profit Models

Revenue Models

- Usage-based charging is inappropriate; ARPU as a measure of value; A new revenue model is needed; The operator-push revenue model; The wholesale pull revenue model

Profit Models: An Overview

- AMPU provides a measure of margins

Retail Revenue/Profit Models

- Multiple approaches can work
- Retail mobile content charging mechanisms: flat-rate charging; event-based charging; on-portal charging; direct-to-consumer charging

Wholesale Revenue/Profit Models

- The role of wholesale mobile content
- New wholesale revenue streams (wholesale mobile content service layers; the wholesale mobile advertising opportunity; the wholesale mobile search opportunity)
- Wholesale charging mechanisms
- Wholesale revenue-sharing: MNOs and content providers; MNOs and third parties; MNOs and end-users

Apple, Nokia and Google Take a New Approach

- Apple iPhone/App store
- Nokia (N-Gage; Nokia 'comes with music')
- Google/Android

4. Scenarios for Mobile Content Revenues

Future Scenarios and Player Types

- Scenario 1: Dumb Pipe; Scenario 2: Smart Pipe; Scenario 3: On-Portal

5. Cellular Market Growth Introduction

Growth of the Cellular Market

- Global subscriber market: growth by region; market share/penetration
- Leading mobile operator groups by subscriber base; 3G growth: global cellular subscriber (m) by technology (2G, 2.5G, 3G, 3.5G/3.9G)

Regional Cellular Market Growth

- Mobile penetration; Market structure/background; 3G adoption/penetration (by technology) for North America; South America; Western Europe; Eastern Europe; Far East & China; Indian Sub Continent; Rest of Asia Pacific; Africa & Middle East

6. Forecasts

Forecast Approach

- What is included/excluded?; Methodology; Retail revenue vs. retained revenue

Forecast Highlights

Mobile Content Subscriber Forecasts

- Monthly ARPU per subscriber (split by voice/data) by region
- Global cellular subscriber growth

Mobile Content Revenue Forecasts

- Total annual data revenues (\$m) by region
- Non-messaging: person-to-person mobile data ARPU/revenues (\$m); total mobile content revenues (end-user generated plus adspend) (\$m)
- By scenario/type of player: non-messaging mobile content revenue distribution (\$m) by category of player (Dumb Pipe; Smart Pipe; On-Portal)
- Regional net revenues (\$m) by category of player, Dumb Pipe, Smart Pipe & On-Portal scenario for North America; South America; Western Europe; Eastern Europe; Far East & China; Indian Sub Continent; Rest of Asia Pacific; Africa & Middle East

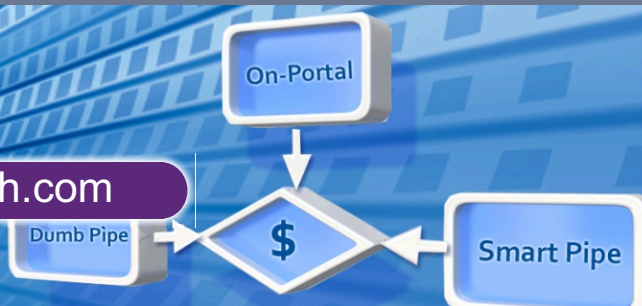
7. Recommendations for Mobile Content Players

- Overview of strategic approach required; Recommendations for mobile network operators/content providers/third parties

8. Case Studies

- Blyk: overview; the Blyk model; mobile advertising; mobile social networking; the role of wholesale; revenue models
- Jump Tap: overview; business models; mobile advertising market drivers; wholesale; revenue models
- mBlox: overview; mobile content revenue models; wholesale; carrier off-portal revenues to double in three years: mBlox
- Valista: overview; off-portal market; wholesale opportunities

119 Pages



companies included

Accel Partners • Advent Venture Partners • Amadeus Capital Partners • America Movil • America Online • Amp'd Wireless • Apple inc • Apple i-phone • AT & T Wireless • BBC • Bell Canada • Blyk • British Telecom (BT) • Coca-Cola • Cricket • Dialog Telecom • Disney Mobile • DRM • Duff Ackerman & Goodrich • Elisalat • Enterprise Ireland • Goldman Sachs • Google • Industrial & Financial Investments • JAFCO • JumpTap • L'Oreal Paris • Mblox • Mobile Telesystems • MSN • MTN • MySpace • Nokia • Nokia Siemens Networks • Norwest Venture Partners • Novus Ventures • NTT • NTT DoCoMo • Oger Telecom • Orange • Orascom Telecom • Rogers Wireless • Saudi Telecom • Scale Venture Partners • Sofinnova Partners • Sprint Nextel • Stepstone • Sutter Hill Ventures • Telecom Italia • Telefonica Moviles Espana • Telenor • Telia Sonera • Telnore • TELUS • Temenor • Tesco Mobile • T-Mobile • Trident Capital • Trinity Venture Capital • Unicom • Valista • Vimplecom • Verizon Wireless • Virgin • Virgin Mobile USA • Vodafone • Walt-Disney • Yahoo! • Yell.com • YouTube • Zain • Zong • ZYB

author profile

Andrew Kitson is a Senior Analyst with Juniper Research. He is responsible for developing Juniper's range of telecoms markets reports and expanding into a number of new telecoms and media sectors, including devices and business practices. He has been researching and analysing the telecommunications industry since 1985 studying the business models and structures of many of the world's leading telecoms operators, service providers, equipment manufacturers/vendors, and system integrators.

Andrew's published work has included a series of regular reports discussing and analysing the key developments and forward-looking trends in fixed-line, mobile communications, and broadband in more than 60 countries and regional sectors. His special focus reports have covered the BRIC (Brazil, Russia, India and China) economies, the Middle East, and Western Europe as well as mobile broadband services in Eastern Europe, Africa, and the Middle East.

to place your order

product details

Please tick your requirement	£	\$	€	hard copy	PDF
Mobile Content Strategies & Business Models Scenarios & Forecasts 2008-2013					
Single User License	1,750	2,620	2,070	<input type="radio"/>	<input type="radio"/>
Multi User Network License (2-5 users)	2,500	3,750	2,960	<input type="radio"/>	<input type="radio"/>
Enterprise Wide License (all organisation)	3,750	5,620	4,440	<input type="radio"/>	<input type="radio"/>
- add additional hardback copy	190	390	280	<input type="radio"/>	
- add trackable courier delivery ^T	40	80	50	<input type="radio"/>	

Post or Fax your order to
 Juniper Research Limited
 Wakeford Farm Business Park, Pamber-End, Tadley, Basingstoke, Hampshire RG26 5QN UK
 Tel (UK): +44 (0) 1256 830002/889555
 Tel (US): +1 408 716 5483
 Fax : +44 (0) 1256 830093

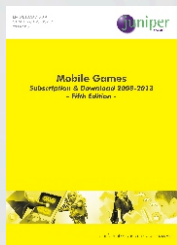
or Order Online or by Email
 Web : www.juniperresearch.com
 email : info@juniperresearch.com

* Euro & US\$ prices are for guidance only. The exact price will depend upon your bank exchange rate (to the £) on the day of order processing. Prices do not include VAT - charged at prevailing rate in the UK.

^T Standard Courier Delivery is Free

Account Services - For further information on account services and respective discounts you can expect to receive, please contact john.levett@juniperresearch.com or (UK) +441256 830002/(US) +1 408 716 5483.

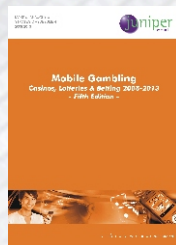
other recent reports



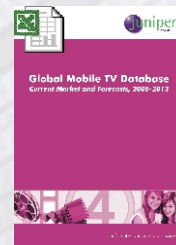
Mobile Games
(Fifth Edition)



Mobile Coupons



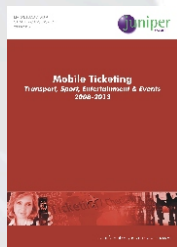
Mobile Gambling
(Fifth Edition)



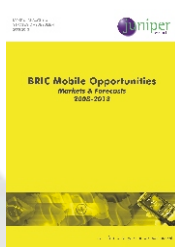
Global Mobile TV
Database



Mobile Dating



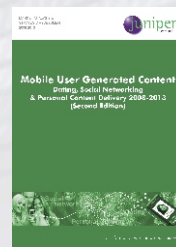
Mobile Ticketing



BRIC Mobile
Opportunities



Mobile TV
(Fourth Edition)



Mobile UGC
(Second Edition)



Mobile Payment
Markets



For further information, or to order online/by email visit www.juniperresearch.com, or contact info@juniperresearch.com. To contact us by post write to: Juniper Research Ltd, Wakeford Farm Business Park, Pamber-End, Tadley, Basingstoke, Hampshire, RG26 5QN UK Tel (UK) +44 1256 830002 Tel (US) +1 408 716 5483 or Fax +44 1256 830093.

The personal information provided by you on this form will be held on a secure database, and will not be shared with any external companies or organisations. If at any time you wish to withdraw your details from our database, or from receiving further information concerning news items, partner news or about new Juniper Research services or products, then please email the news@juniperresearch.com with the words UNSUBSCRIBE in the subject line. Alternatively write to us at the above address.