

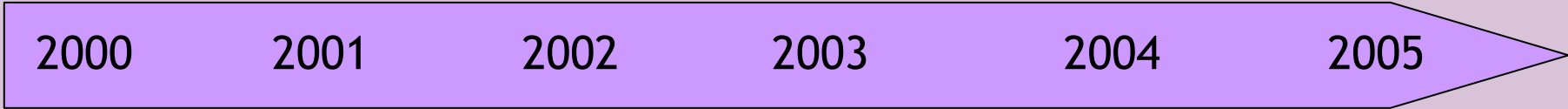
Welcome



The evolution of third party mobile content services in the Belgian market

Jan Van Wijnendaele
Group Market Manager - B2B2C
Proximus - Belgacom Mobile

Some history



SMS

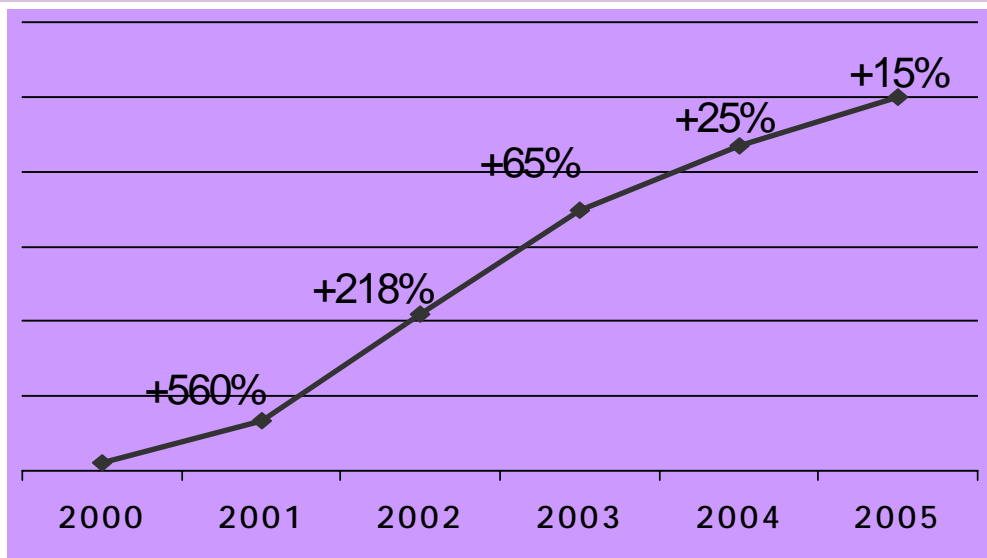
MMS

LBS

VFL!

Status Belgian TP premium market

- Success story



Key Success Factors SMS

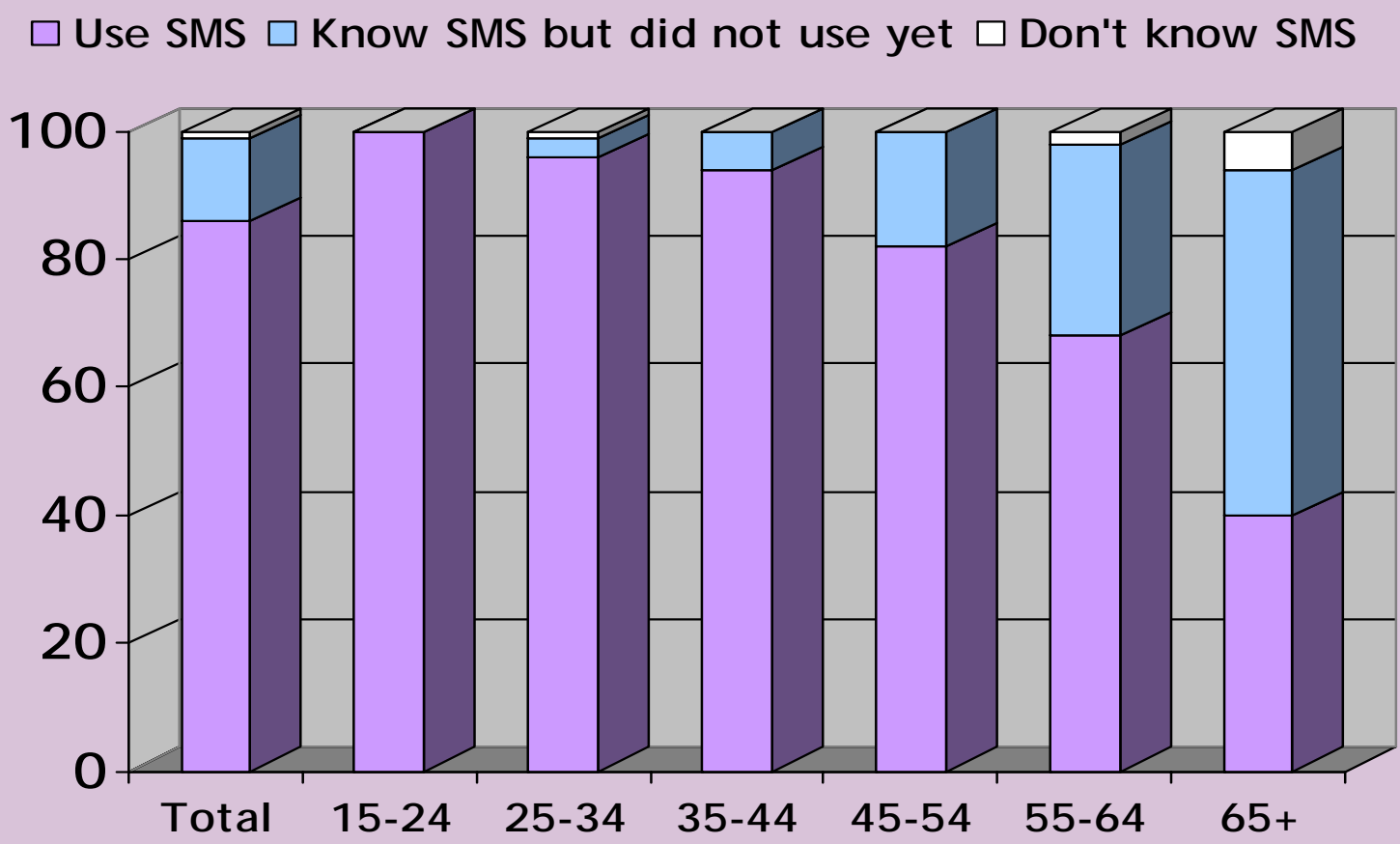
- Easy user experience
- Cross operator offer
- Mass market reach

- SMS is main driver of TP market
- MMS did not deliver yet but starting up now
- WAP is taking off

Today: ± 300 Content Providers ± 1000 Shortcodes

SMS - Market reach

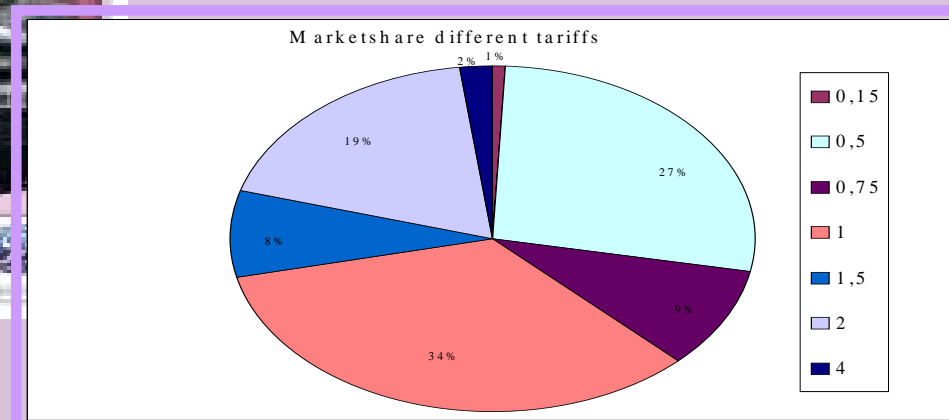
- Mobile = Reach everybody
 - SMS usage Belgian market



Source: Proximus (jan 2005)

SMS premium insights

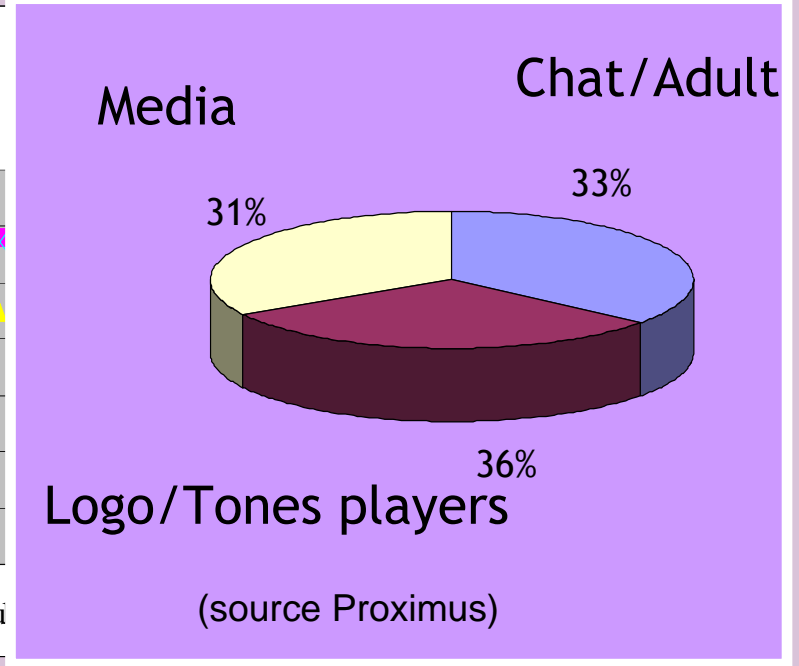
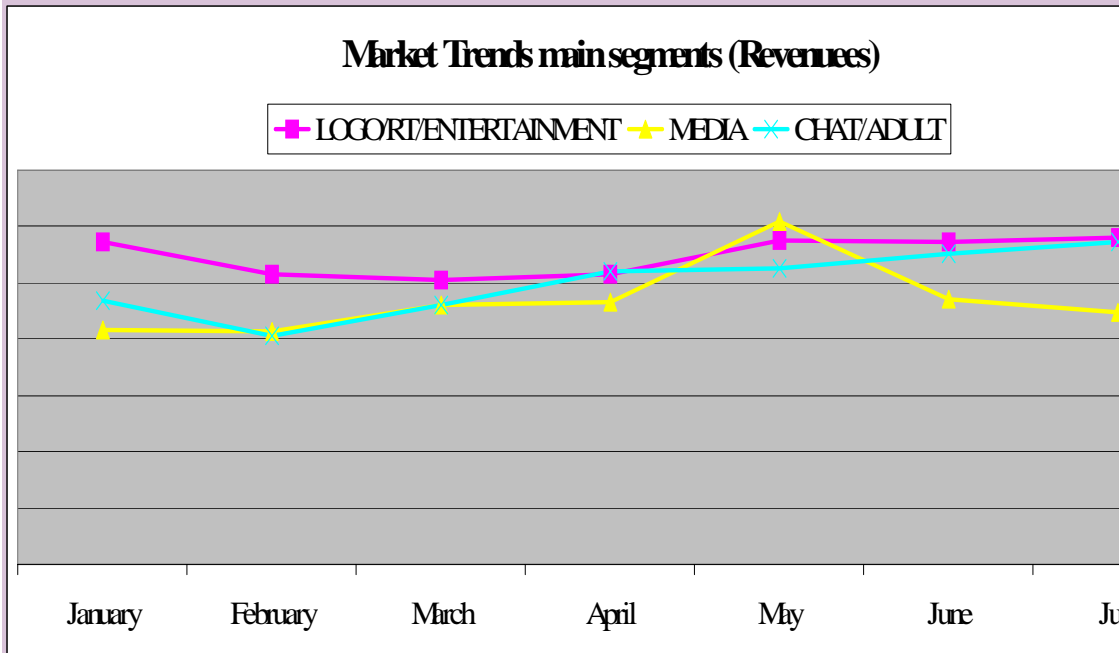
- Main service use
 - Interactivity (vote, chat, communicate, participate, ...)
 - Mobile content (games, logo's, tones, music, ...)
- Creativity is the only limit...



(source Proximus)

- Service pricing
 - SMS used for small value transactions
 - SMS transactions priced mainly till € 1 (71% ≤ € 1)

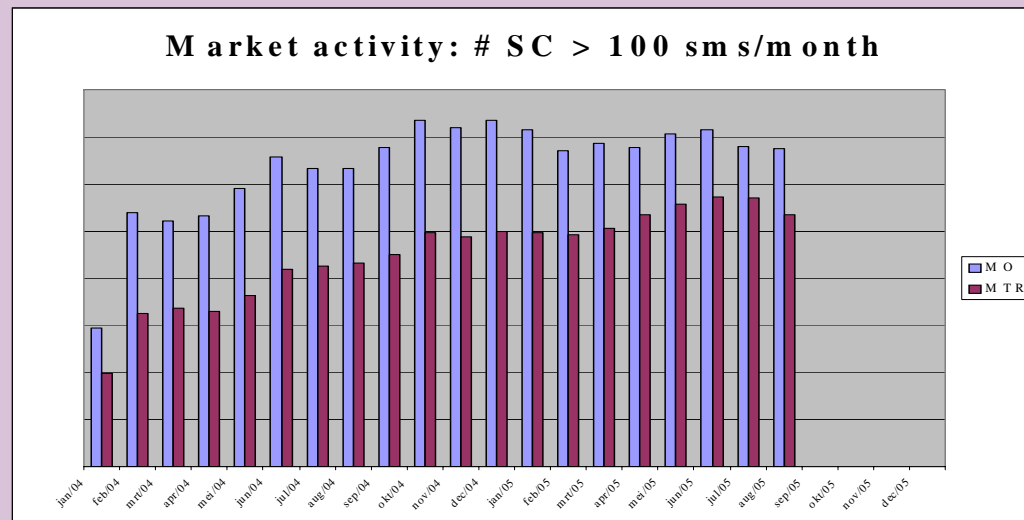
Today's main market players SMS premium



- Logo/tones players have become # 1 in the market
- New market model has emerged:
 - subscription services for download services

Market trends & opportunities

- SMS market will still grow



(source Proximus)

Main market drivers

- Media
- Entertainment
- Adult
- Content

- With new participants: more traditional corporate customers
- Mobile Marketing
- Mobile as marketing/communication tool

Case: Mobile Government

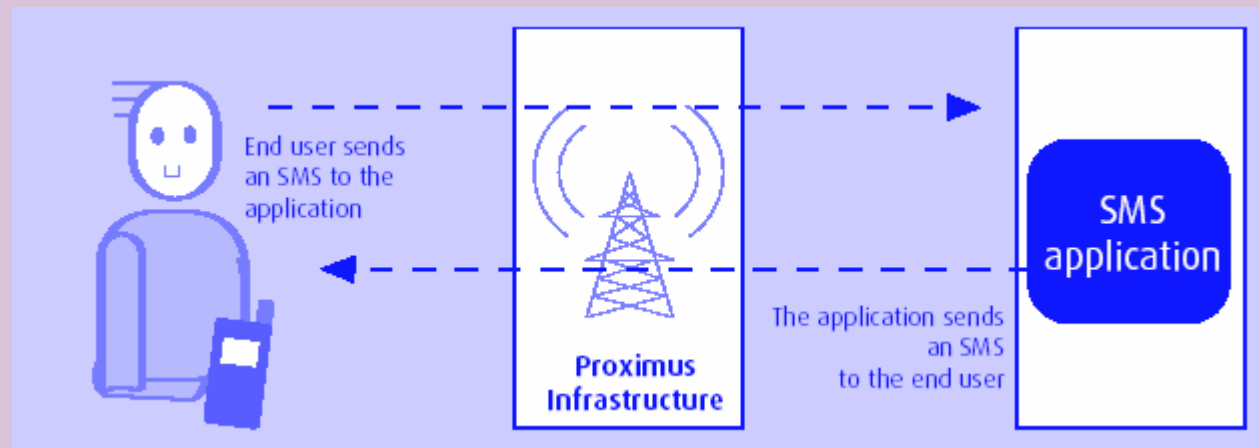
Estaimpuis offers SMS-based services to its citizens

The municipality of Estaimpuis is offering its citizens the chance to benefit from SMS-based services related to municipal, administrative, associative, and other relevant affairs, all free of charge. Citizens must first give their consent before they can receive this information.

The primary motivation behind this idea was to have a means of rapid communication in emergency situations. This solution, which uses text messages, now allows the municipality to selectively send information to those citizens who desire it.



Daniel Senesael



Moving from mono to digital

- MMS:
 - Adding picture
 - Adding sound
 - Adding video

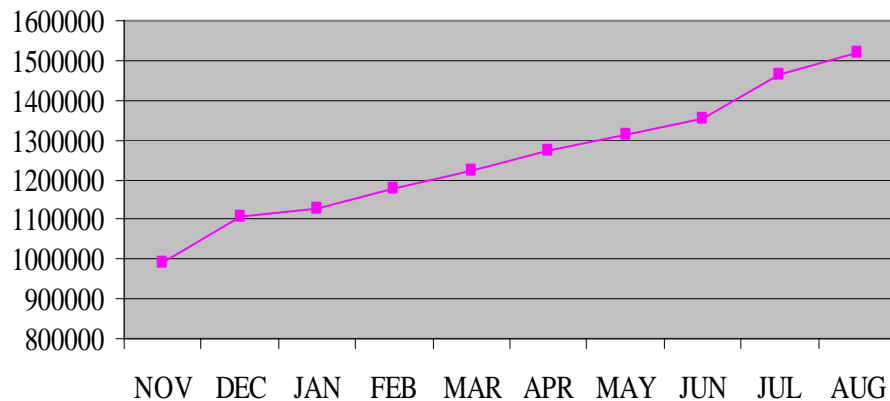
- New media:
 - Video streaming
 - Mobile TV
 - Hello Tones
 - Mobile music downloads



Market trends & opportunities

- MMS will take off
 - User experience: customers are getting educated
 - Multi operator offer
 - Mass market reach:
 - already 36% customer base MMS handset

MMS Handsets on Proximus Network



(source BMB)

MMS user:

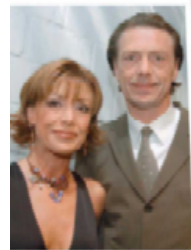
- Needs contact with others
- emotional relationships
- impulsive, spontaneous, fear of exclusion
- interactive
- handset is part of social life
- MMS is perceived as a gift (sending + receiving)

(source BMB)

Market trends & opportunities

- MMS take off begins today!

Jij bent de eerste die het weet!



Groot Rouffaer breekt na vijf jaar huwelijks met man.



Kiert Rogiers is papa geworden



Kim Gijsters van US Open



U maakt mee uw krant

Nu op VTM
09u10:: Onderbreking
Straks op VTM
12u15:: Rad Van Fortuin

VDAB stuurt vacatures via mms



SAMEN STERK IN WERK
VDAB met nieuwe mobiele dienstverlening.

De Vlaamse Dienst voor Arbeidsbemiddeling en Beroepsopleiding (VDAB) gaat vacatures en opleidingen versturen via multimedia messaging service. De nieuwe on-linedienst wordt gelanceerd op 5 september.

Werkzoekenden konden, naast e-mail, al sms'en met de VDAB via de gratis dienst *mail op maat*. Deze dienst wordt nu uitgebreid met mms. Het voordeel is dat je met mms meer informatie krijgt over een vacature of opleiding, tot 18.000 karakters. (belga)



Hoe inschrijven op de dienst

- Voor sms (enkel tekst): Stuur een sms-bericht met als tekst G099P9M9 (zonder spaties, in 1 woord) naar het nummer 3771.
- Voor MMS (tekst en beeld): Stuur een sms-bericht met als tekst G059P9M9 (zonder spaties, in 1 woord) naar het nummer 3771. (Opmerking: deze dienst is pas beschikbaar vanaf 27 september en voortop enkel voor Proximus-abonnees.)

3771
0,50 euro/sms

3771
1,00 euro/MMS

Hoe uitschrijven?

Als je de nieuwsjes niet meer op je gsm wenst te ontvangen, stuur dan een sms-bericht met als tekst STOP naar 3771 (dit geldt zowel voor sms als voor MMS).

SMS/MMS: **4004**

BEL: 02/467 **4004**

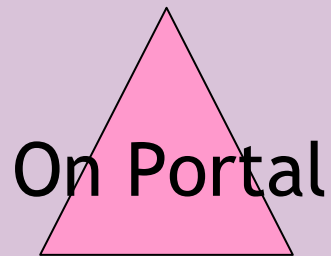
MAIL: **4004@4004.BE**

SCHRIJF: POSTBUS **4004** - 1702 GROOT-BIJGAARDEN

Market trends & opportunities



- What about WAP?
 - Wap portal rebranding (0-world, Vodafone live!)
 - 76 % of sold phones have color WAP (june 2005)



Listed Partner Model

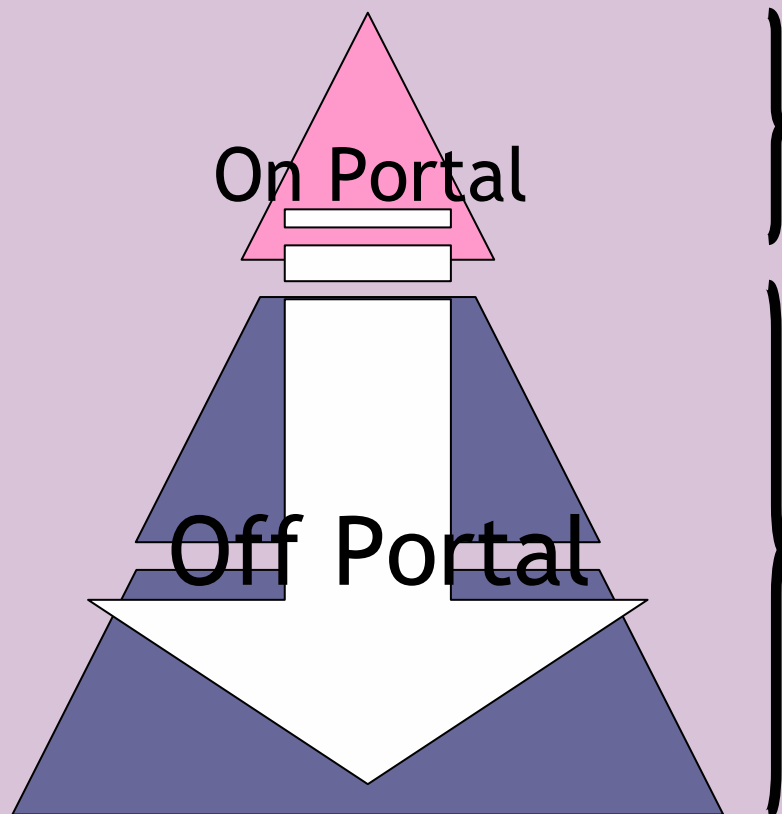


Today Billing via SMS

Opportunity: Develop the Mobile Payments Market



- Develop the OFF-Portal opportunity



Listed Partner Model

New opportunity area:
WAP OFF-Portal area
WAP billing: micro payments

End user experience

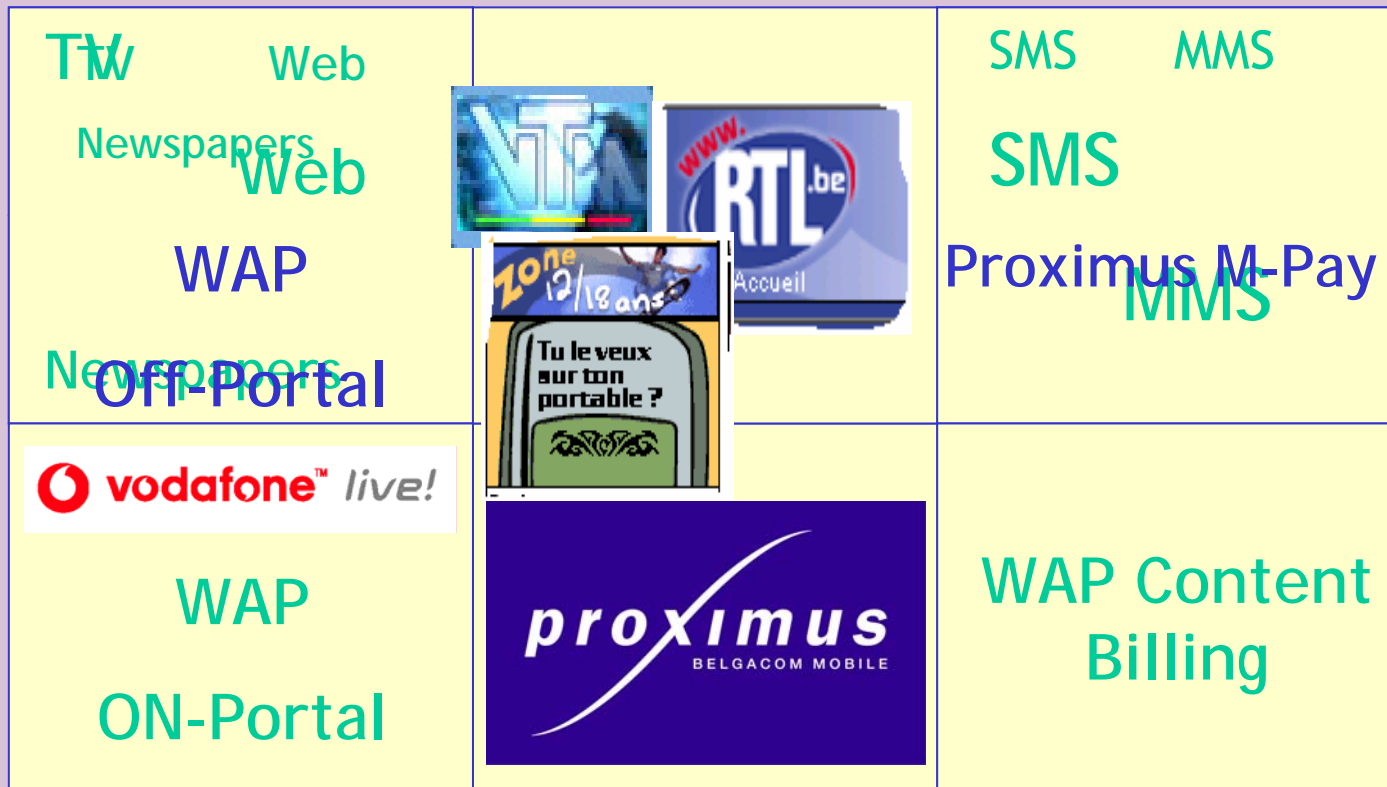


2006

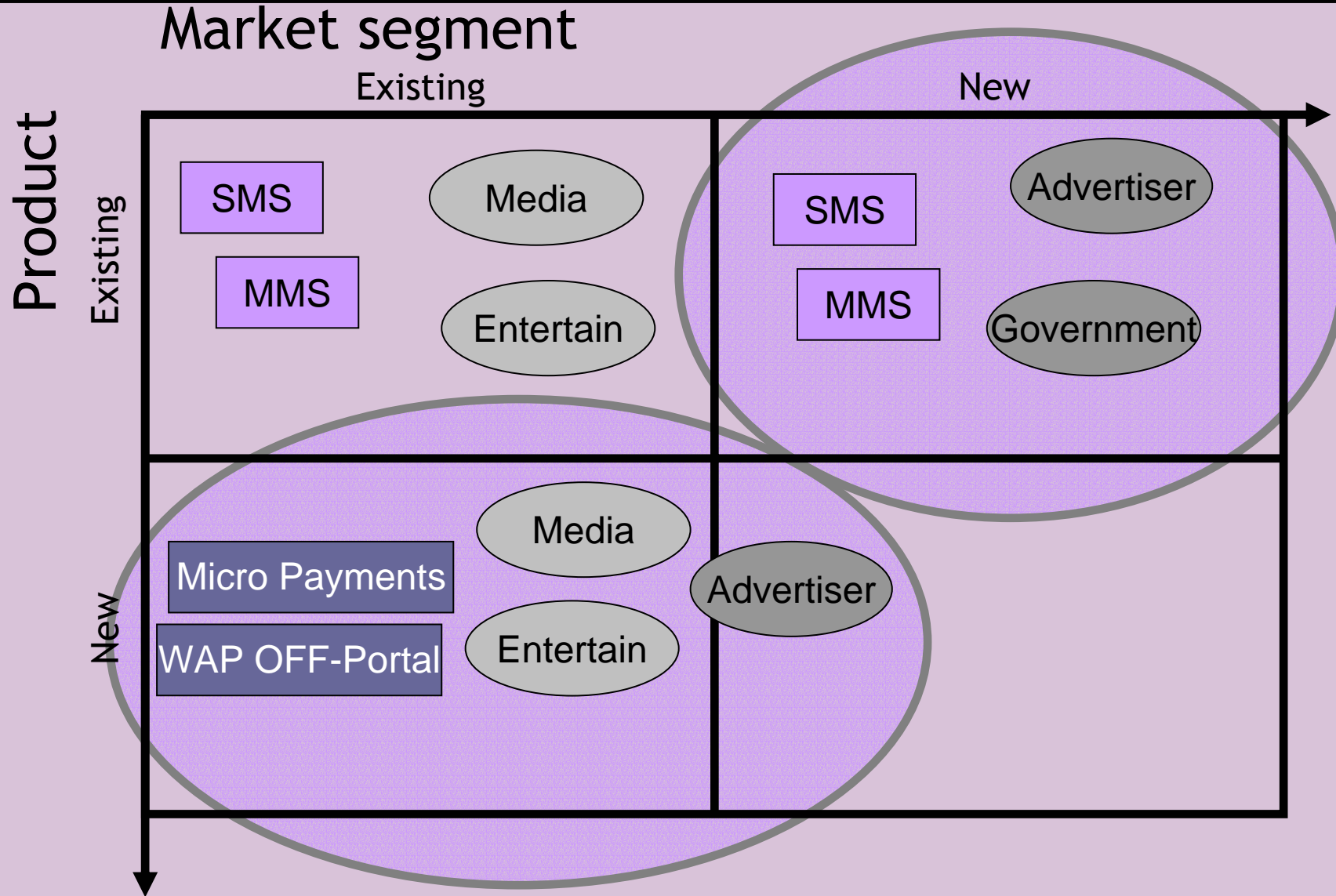
Shops
on ...

Buys
from...

Pays
with...



Future market evolution

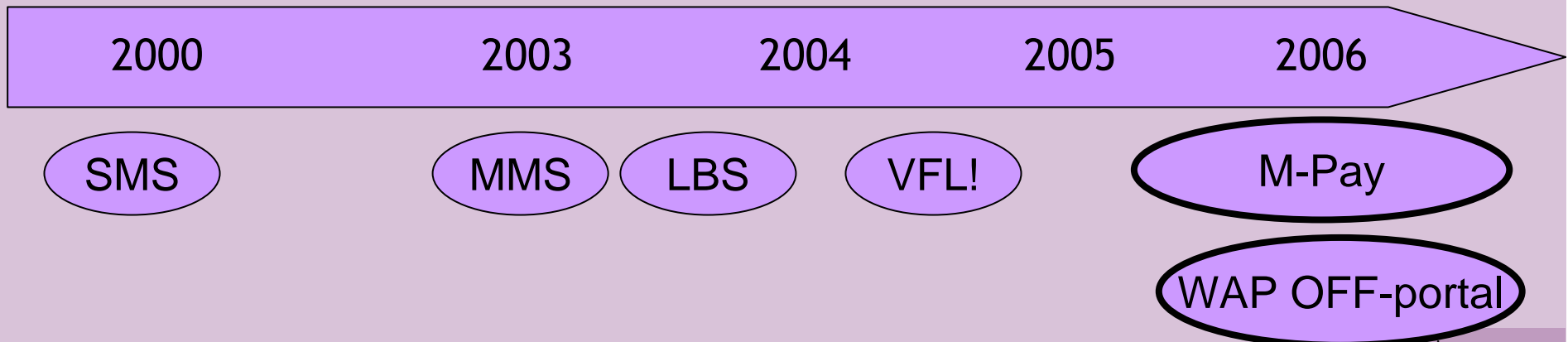


What can you expect from Proximus?



Develop the Mobile Payments Market

- Stimulate the OFF-portal WAP world
- Offer WAP & WEB mobile billing means



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- More info!
 - Contact Brigitta Leys
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 - Brigitta.Leys@proximus.net