



Executive Summary: Latin American Mobile Content Services Markets I & II

I: Brazil, Colombia, Mexico

II: Argentina, Chile, Venezuela

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Latin American Mobile Content Services Markets I



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Executive Summary

- ✓ **Economic Downturn** - Despite the economic downturn from the last quarter of 2008 to 2009, the total Latin American mobile content services markets maintained its growth trend. Brazil and Mexico witnessed growth by a rate of 15.8 and 6.7 percent, respectively, while Colombia declined by a rate of 0.9 percent.
- ✓ **The Total Latin American Mobile Content Services Markets** - The total mobile content market in Latin America is nearing saturation with a considerable number of subscribers. In Brazil, Colombia, and Mexico, the mobile penetration rates were 92.2, 84.3, and 77.2 percent, respectively. Nevertheless, mobile content users' penetration rates in these countries were 10.2, 15.1, and 22.4 percent, respectively.
- ✓ **Main Facts in Latin America** - In Brazil, Vivo's launch of an open platform for application developers and Tim's announcement of an application store in partnership with QUALCOMM Incorporated were among the main facts for the mobile content market. Meanwhile, Comcel and Nokia announced their alliance to open Ovi store in the Colombian market, and in Mexico, Televisa Group bought 30 percent stake on NII Holdings, which enables the former to provide wireless and broadband data services to its existing portfolio of pay TV offerings.
- ✓ **Market Drivers and Restraints** - The mobile content market is expected to grow by a double-digit rate in Brazil, Colombia, and Mexico. Penetration of feature-rich and capable handsets that enable advanced contents and increase in the adoption of mobile broadband are among the main drivers for the market growth. However, the high price for data plans in Latin America, coupled with a common perception of mobile data as a high-cost service, inhibit the demand for advanced contents.

Executive Summary (Contd...)

- ✓ **Mobile Content Services** - Subscription services are the most common and used in Latin America due to their low prices. However, TV/video services are expected to witness the highest growth in the next few years, stimulated by the penetration of capable handsets and the FIFA World Cup. Music and games are likely to witness similar growth, with huge opportunities in the countries analyzed. Apart from the general analysis, some services witness excellent growth in specific markets, for instance, penetration of TV/video in Mexico, stimulated by higher penetration of feature-rich handsets and smartphones with lower prices in this country, and the success of ring-back tones in Colombia, which was driven by an innovative billing model of a local operator and a cultural predisposition to adopt music services.
- ✓ **Application Stores** - After the launch of manufacturers' application stores in Latin America, mobile operators are expected to launch their own application stores in each country by 2010. In Brazil, Vivo was the first to launch an application store with an open platform, while Tim, Claro, and Oi are expected to launch their own stores before the end of 2010. A similar trend is expected in Colombia, where Comcel and Movistar are trying to open their application stores in 2010, while Tigo plans the launch of a music store in the same year. In Mexico, the three main operators are planning to provide their application stores by 2010. Despite the plans to open their own application stores, Telcel and Comcel, America Movil companies, partner with Nokia to provide Ovi store in their countries.



Executive Summary (Contd...)

✓ **Competitive Structure** - The **Brazilian** mobile content market is one of the most competitive in Latin America, with four nationwide participants. **Vivo** holds the **market leadership position** in terms of mobile content revenues and subscribers. The operator **focuses on a wide variety** of content offers, especially music, and was the first to launch an application store.

Tim holds the second position, **focusing on low price** for content acquisition and **simple layout**.

Claro is the third-largest operator and focuses on investment in **partnerships** with **content providers** to develop attractive contents. The operator also has great offering of **video** at competitive prices.

Oi is the fourth-largest mobile content operator. It **stimulates the development of regional contents** and **focuses on music** contents to attract youngsters.

Nextel invested in **partnership** with the main **content developers** to create attractive services for its high-income consumer base; however, it needs **3G technology** to improve advanced contents.

In **Colombia**, the market is highly concentrated on a single operator that has national coverage and competitive prices for mobile content services, **Comcel**. With a **wide variety** of mobile content offerings, the operator competes in this market with **low prices** and **strong promotional activities** to stimulate data traffic.

In **2009**, **Movistar**, the second-largest mobile operator in this market, invested in the expansion of coverage with its GSM and 3G networks. It focuses on **high-quality** content and a **wide variety** of services.



Executive Summary (Contd...)

Tigo, the third-largest operator in the Colombian market, grew in importance by providing **low-price services** to attract consumers that cannot afford premium services. It also invested in **promotions, innovative contents, packages of minutes**, and an **innovative billing model** for ring-back tones.

Similar to Colombia, the mobile content market in Mexico is also highly concentrated on a single operator with national coverage and competitive prices, **Telcel**. The operator sets **strategic partnerships** with companies such as **Nokia, ESPN, and Disney** among others to attract consumers that have interest in **premium services with low prices**. It also has a complete structure to provide TV/video, music, and subscriptions contents.

Movistar, the second-largest mobile operator in Mexico, creates a more **segmented and focused** proposal oriented to all the consumer segments, from children to adults. It also invested in its **loyalty program, Movistar Club** to attract and retain consumers that are willing to pay less for mobile services.

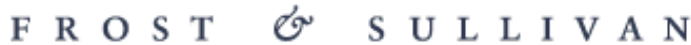
Tigo, the third-largest mobile content operator, **invested in new business models** such as video on demand for mobile TV focused on specific clients segments. It also invests in quality and **focuses on contents** that **consumers are more willing to acquire**.

Nextel is the fourth-largest operator in this market. It provides **basic content services** such as SMS, subscription services, and alarms.

Latin American Mobile Content Services Markets II



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Executive Summary

- ✓ **Economic Downturn** – Despite the global economic downturn that was witnessed between the last quarter of 2008 and whole of 2009, the mobile market witnessed growth in most of the Latin American countries. It grew by 4.4 percent and 23.7 percent in Argentina and Venezuela, respectively, and declined by 4.5 percent in Chile.
- ✓ **The Total Latin American Mobile Content Services Markets** – The mobile market in Latin America is nearing saturation in terms of the number of subscribers. In Argentina, Chile, and Venezuela, mobile penetration reached 121.3 percent, 103.5 percent, and 105.7 percent, respectively, in 2009. Nevertheless, mobile content penetration in these countries reached 14.8 percent, 12.1 percent, and 9.5 percent, respectively.
- ✓ **Main Facts in Latin America** – In Argentina, the launch of a music store by Personal and an application store by Movistar were among the main events in the mobile content market in 2009. Meanwhile, Claro and Nokia initiated negotiations to open Ovi Store in the Chilean market; in Venezuela, Movilnet launched the Vergatario, which is the first handset made in the country, and the Government centralized the national purchase of handsets, thereby restraining operators' revenues.
- ✓ **Market Drivers and Restraints** – The mobile content market is expected to witness double-digit growth rates in Argentina, Chile, and Venezuela. Improvement in mobile content quality and applications, penetration of feature-rich handsets that enable advanced content downloads, and increase in mobile broadband adoption are some of the main drivers for the Latin American mobile content markets. However, high price of data plans in Latin America results in the common perception of mobile data being a high-cost service; this inhibits the demand for advanced content.

Executive Summary (Contd...)

- ✓ **Mobile Content Services** – Subscription services are the most commonly used ones in Latin America because of their low price. However, TV/video are expected to witness high growth in the next few years, stimulated by the penetration of capable handsets and FIFA World Cup in 2010. Music has already achieved high penetration rates, and gaming is likely to witness higher growth rate and present many opportunities in Latin America. Some services are in different stages of lifecycle in various countries, for instance, in Argentina, operators are still waiting for final regulations to develop mobile TV.
- ✓ **Application Stores** – After the launch of manufacturers' application (APP) stores in Latin America, mobile operators are expected to launch their own APP stores in each country by 2010. In Argentina, Movistar was the first to launch an APP store with an open platform, while Personal and Claro are expected to launch their own stores before the end of 2010. The same trend is expected in Chile, where Entel offers applications through Kool Tools, and other operators are planning for their future store launches. Claro is expected to launch Claro Widgets, a service based on the Mobile Internet application developed by Qualcomm Plaza that will allow 190 million customers in Latin America to download new applications, in 2010.



Executive Summary (Contd...)

- ✓ **Competitive Structure** –The mobile content markets in **Argentina**, Chile, and Venezuela are the most competitive ones in Latin America, with four nationwide participants. Movistar is the leader in the Argentinean market in terms of revenues. The operator focuses on a wide variety of content and was the first to launch an APP store.

Claro was ranked second; it focuses on low price and simple layout.

Personal was ranked third; it focuses on offering mobile content in music stores and developing attractive and innovative content.

Nextel was the fourth major mobile operator. Though it is the newest participant in this market, it has witnessed high downloads of its content, as most of its clients are from the corporate sector.

In **Chile**, the market is highly dominated by two operators that have nationwide coverage and aggressive prices for mobile services - Movistar and Entel PCS. With a similar wide variety of content offers, both operators compete in this market in terms of prices and promotions aimed at stimulating data traffic .

Claro, the third participant in this market, planned to expand its coverage and invested in 3G networks in 2009, covering almost 85 percent of the population.



Executive Summary (Contd...)

In **Venezuela**, the mobile content market is dominated by one operator that has nationwide coverage and aggressive prices - Movistar. It focuses on customer retention and clients segmentation. In 2009, Movistar offered more plans at reasonable prices, which resulted in increased revenues for it.

CANTV leads the mobile content market in Venezuela in terms of number of users; in 2009, the company implemented a successful strategy, launching a new tariff scheme with prices reduced by about 20 percent.

Digitel is the third-largest participant in the Venezuelan mobile content market and the last operator to enter the mobile market in the country. Its investments are focused on technology upgrades and enhancement of network efficiency. The company improved the competition and it accounted for 21.0 percent of the total mobile content users in Venezuela in 2009. Its strategy focuses on 3G network improvement and positioning itself as an innovative company.

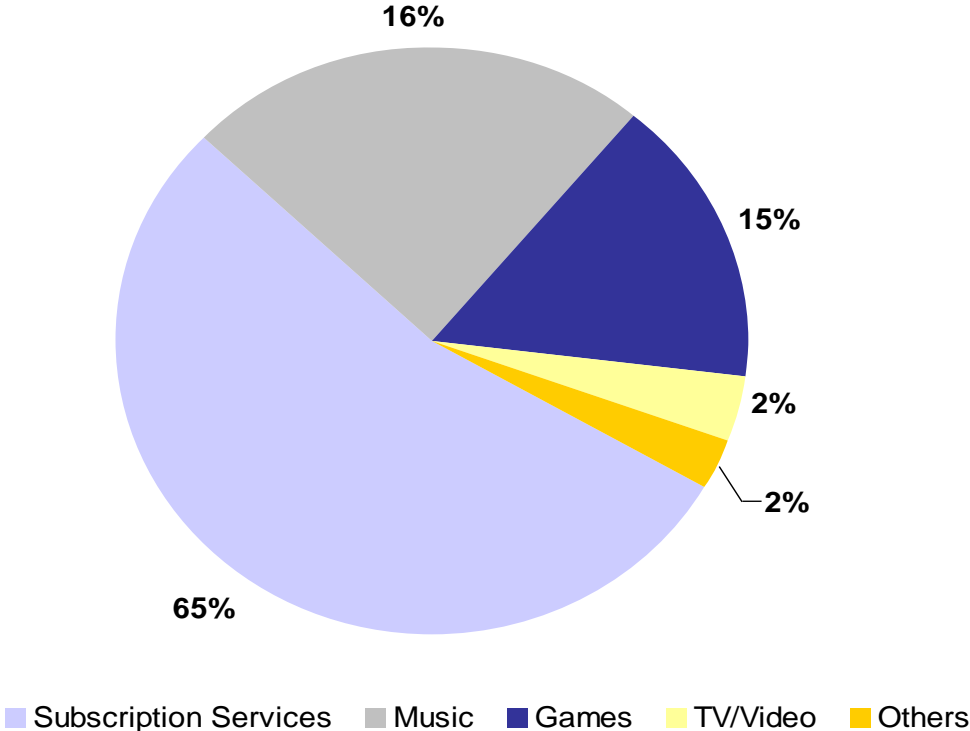
Graphics



Market Sizing – Latin America

Mobile Content Services Market: Percent of Revenues by Service Type (Latin America), 2009

Mobile Content Revenues 2009 = US\$2,409.6 Million



Note: Others include image and graphic services (wallpapers, pictures, and so on)

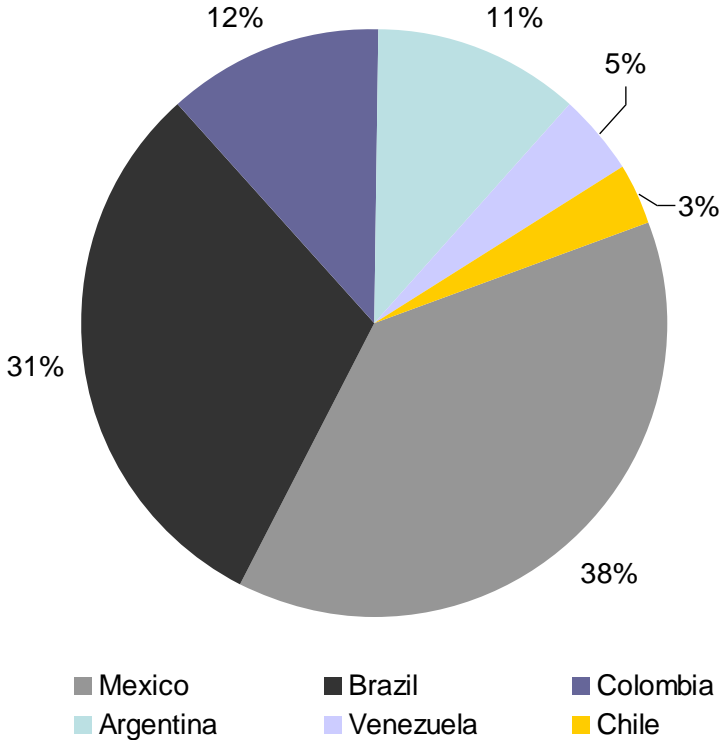
Note: All figures are rounded; the base year is 2009.

Source: Frost & Sullivan

Market Sizing – Latin America

Mobile Content Services Market: Percent of Subscribers by Mobile Operator (Latin America), 2009

Mobile Content Subscribers 2009 = 63.2 Million



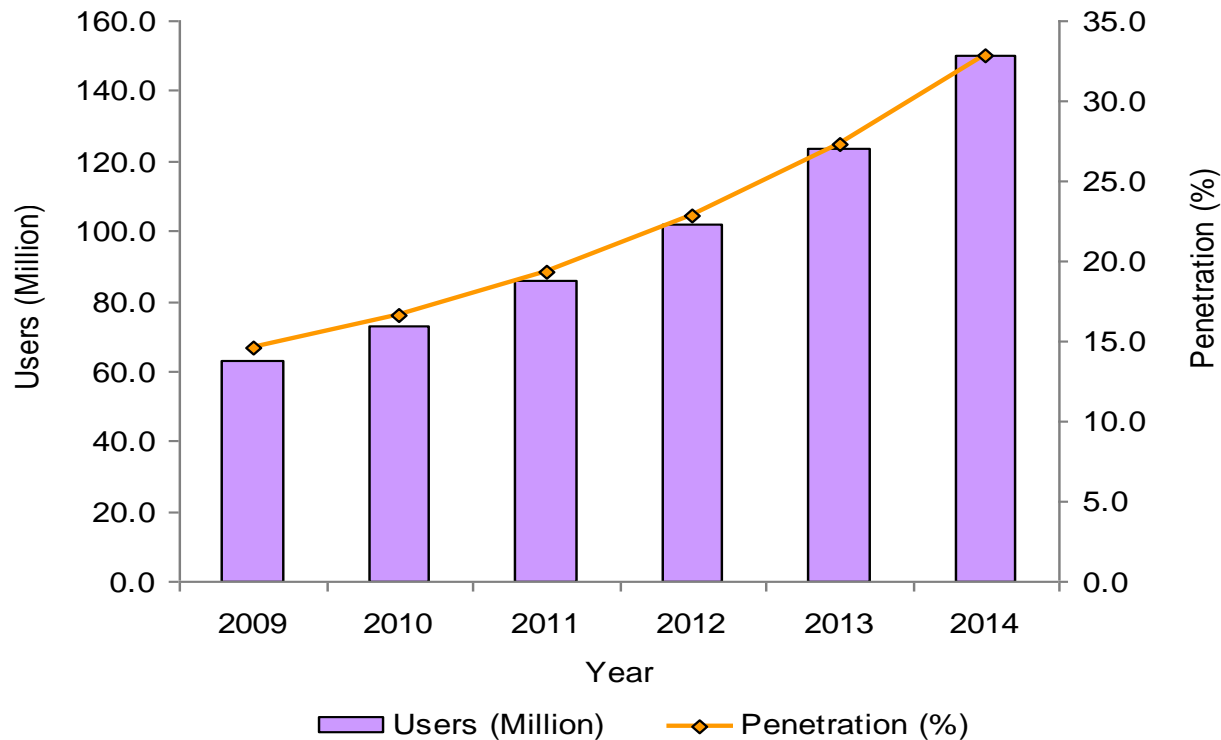
Note: Others includes local participants such as CTBC Celular, Sercomtel and Aeiou

Note: All figures are rounded; the base year is 2009.

Source: Frost & Sullivan

Market Forecasts – Latin America

Mobile Content Services Market: Users Base and Penetration Rates in Latin America Population (Latin America), 2009-2014



Note: All figures are rounded; the base year is 2009.

Source: Frost & Sullivan

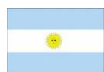
Methodology and Service Definitions



Methodology

✓ **Revenues** - This study presents the net revenues obtained either directly from service providers' financial reports or through the primary interviews conducted.

✓ **Exchange Rates** - The U.S. dollar is the official currency used in this study to measure revenues. The exchange rates of certain countries for 2009 are given below:



1US\$ = AR\$ 3.80



1US\$ = R\$ 1.75



1US\$ = CLP\$ 634.25



1US\$ = CP\$ 2,064.63



1US\$ = MXP\$ 13.04



1US\$ = Bs.F\$ 2.15

✓ **Forecasts** - This study presents a six-year forecast for revenues, from 2009 to 2014. The US Dollar projection uses year-base exchange rate frozen throughout the whole period.

✓ **Research Methodology** - Frost & Sullivan conducted **primary interviews** with the key executives (managers and directors) from different areas (marketing, strategic planning, market intelligence, and product and content services) within the most important service providers in the six countries on the scope of this study. Extensive **secondary research** was conducted for two months throughout Frost & Sullivan's internal database and other public information sources such as financial reports, industry associations, statistic agencies, and the Internet.

Service Definitions

- ✓ **Content** - Mobile content comprises all the download services such as music, games, video/TV and images, and subscription services through SMS (excluding contests, operator promotions, and televoting services) provided by the mobile operator.
- ✓ **Music** - Music contents comprise the download of MP3-format music, ring tones, ring-back tones, and all the services related to music files downloaded from operators' music stores and other services, such as SMS or MMS.
- ✓ **Games** - Games comprises all the games downloaded from operators' Web sites or provided through other services such as SMS or MMS.
- ✓ **Subscription Services** - These comprise all the information services acquired through subscription and provided by the operator through SMS/MMS or WAP services such as travel, weather, horoscope, sports, and economy among other information subscription services.
- ✓ **TV/Video** - This comprises all the paid mobile video and TV services provided by mobile operators such as video download, video streaming, video on demand, analog TV, and digital TV.
- ✓ **Others** - These comprise wallpapers, pictures, and graphics among other picture-based downloads from operators' Web site or received through SMS services.

Note: Interactive SMS services (such as operators' contests and promotions) as well as application services or contents downloaded from **manufacturers' Web site** are not included.

About Frost & Sullivan



Who is Frost & Sullivan

The Growth Consulting Company

- Founded in 1961, Frost & Sullivan has over **45 years** of assisting clients with their decision-making and growth issues
- Over 1,700 Growth Consultants and Industry Analysts across 32 global locations
- Over 10,000 clients worldwide - emerging companies, the global 1000 and the investment community
- Developers of the **Growth Excellence Matrix** – industry leading growth positioning tool for corporate executives
- Developers of **T.E.A.M. Methodology**, proprietary process to ensure that clients receive a 360° perspective of technology, markets and growth opportunities
- Three core services: **Growth Partnership Services**, **Growth Consulting** and **Career Best Practices**

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Global thought leader exclusively focused on addressing client growth strategies and plans – Team actively engaged in researching and developing of growth models that enable clients to achieve aggressive growth objectives.

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Cover the broad spectrum of industries and technologies to provide clients with the ability to look outside the box and discover new and innovative ideas.

Global Perspective

32 global offices ensure that clients receive a global coverage/perspective based on regional expertise.

360° Perspective

Proprietary T.E.A.M.TM Methodology integrates all 6 critical research methodologies to significantly enhance the accuracy of decision making and lower the risk of implementing growth strategies.

Growth Monitoring

Continuously monitor changing technology, markets and economics and proactively address clients growth initiatives and position.

Trusted Partner

Working closely with client Growth Teams – helping them generate new growth initiatives and leverage all of Frost & Sullivan assets to accelerate their growth.

T.E.A.M. Methodology

Frost & Sullivan's proprietary **T.E.A.M. methodology**, ensures that clients have complete “360 Degree Perspective” from which to drive decision-making. **T**echnical, **E**conometric, **A**pplication, and **M**arket information ensures that clients have a comprehensive view of industries, markets, and technology.

Technical

Real-time intelligence on technology, including emerging technologies, new R&D breakthroughs, technology forecasting, impact analysis, groundbreaking research, and licensing opportunities.

Econometric

In-depth qualitative and quantitative research focused on timely and critical global, regional, and country specific trends, including the political, demographic, and socioeconomic landscapes.

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