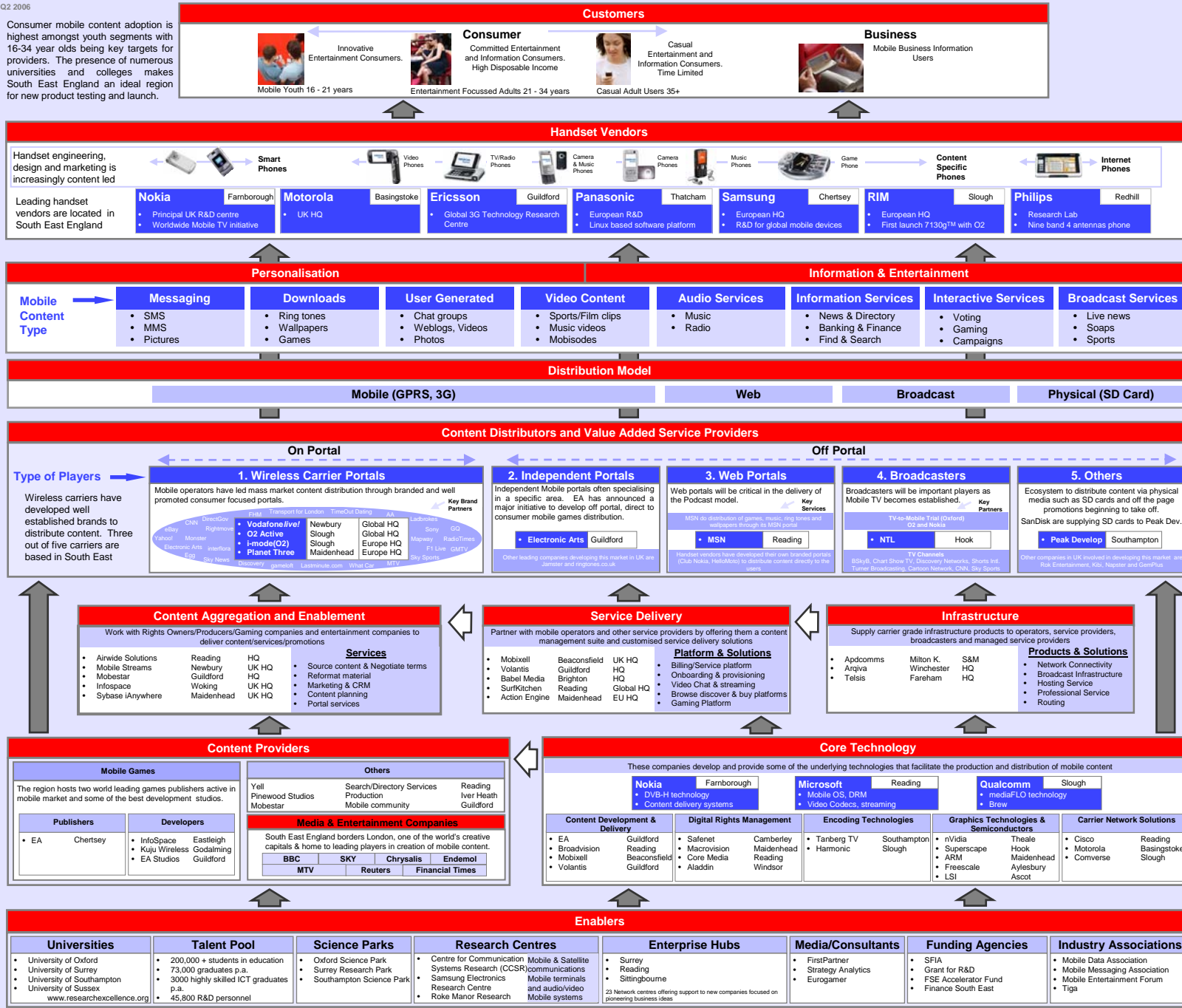


Mobile Content Market Map

Q2 2006

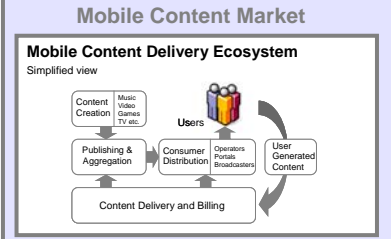
Consumer mobile content adoption is highest amongst youth segments with 16-34 year olds being key targets for providers. The presence of numerous universities and colleges makes South East England an ideal region for new product testing and launch.

Purpose of the Map: The map provides an overview of the vibrant ecosystem that has evolved in South East England driving the Mobile Content market. The importance and diversity of companies based in the region makes it an ideal location for a European presence.



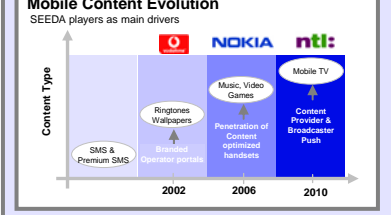
Introduction
 South East England is already home to many of the world's most influential and successful companies. Key factors for locating in the region include: availability of high quality, suitably qualified staff; good infrastructure; proximity to international airports, seaports and London; high quality of life; the ability to retain highly qualified engineering staff and the strength of academic research and technical assistance capability in the region.

- Key Facts**
- South East England is the UK's largest region by size of population & workforce
 - 34% of the working population holds an academic degree
 - The region hosts 24 universities and higher education institutions
 - 97 University departments with internationally excellent research
 - University of Oxford has been ranked 3rd in world university rankings
 - Over 5,100 international companies are located in the region
 - Over 1,600 North American companies are in the region
 - Businesses spent over \$6bn on R&D in 2003
 - South East based government establishments spent \$1bn in 2003



Market Commentary

- Handset vendors are introducing and heavily marketing increasingly sophisticated handsets to support music, imaging, gaming & TV.
- Off portal service growth is growing rapidly and challenging the traditional dominance of mobile operators in controlling content and distribution.
- The last year has seen significant activity in the development of mobile TV services involving all major mobile operators and broadcasters. Mobile TV opens up new opportunities for technology, content and service providers.
- Leading media & entertainment companies are actively developing mobile content and services.



Disclaimer
 The map includes information compiled from various reputable sources and other methods like structured interviews & surveys, conference material and information available in the public domain. As data and information sources are outside our control, SEEDA and FirstPartner makes no representation as to its accuracy or completeness. All responsibility for any interpretation or actions based on this map lies solely with the reader.