

## GLOSSARY

→ **3G**  
The third generation wireless service promises to provide high data speeds, always-on data access and greater voice capacity. The high data speeds enable full motion video, high-speed internet access and video-conferencing, and are measured in Mbps.

→ **Ad Impression**  
Measurement of each time that a user is exposed to an ad either on an SMS message, on a web page or within a video clip.

→ **Ad Unit**  
Specific vehicle used for advertising that appears inside an ad-space - eg. a banner ad.

→ **Aggregator**  
An organisation that acts as a middleman between application and content providers, and mobile carriers.

→ **App**  
Short for application. Content or service downloaded by user and sits on handset. Used by iPhone, G1, Google Phone and others.

→ **Average Revenue Per User (ARPU)**  
A commonly used financial benchmark to measure the average revenue generated by a mobile carrier's mobile subscriber, or "user".

→ **Bluetooth**  
A communication protocol that enables mobile devices equipped with a special chip to send and receive information wirelessly over short-ranges, used in interactive outdoor posters.

→ **Carrier**  
A company that provides wireless telecommunications services.

→ **Click to Call**  
A service that enables a mobile subscriber to initiate a voice call to a specified phone number by clicking on a link on a mobile web site.

→ **Common Shortcode (CSC)**  
Short numeric numbers (typically 4-6 digits) to which text messages can be sent from a mobile phone in order for users to receive links to mobile content.

→ **Cost per Thousand (CPM)**  
A metric used to price advertising banners.

→ **Deck Portal**  
A browsable portal of links to content, pre-configured usually by the network operator, and set as the default home page to the phone's browser.

→ **Dedicated Short Code**  
The process of running only one service on a Common Short Code at any given time.

→ **Digital Video Broadcasting-Handset (DVB-H)**  
The technology that drives mobile TV, which is a combination of conventional digital video, and IP that scales for smaller devices.

→ **Direct To Consumer (D2C)**  
Content and services promoted directly by the third-party "provider" to the phone end-user.

→ **Double Opt-in**  
The process of confirming a mobile subscriber's wish to participate in a mobile program by requesting the subscriber to opt-in twice, prior to engaging the subscriber. A requirement for premium and many other types of mobile services.

→ **Dynamic Ad Delivery**  
The process by which a mobile advertisement is delivered, via a campaign management platform, to a publisher's mobile content.

→ **Free to End User (FTEU)**  
An FTEU program is any program to which the subscriber opts-in, with the result that the subscriber receives Mobile Terminated (MT) SMS/MMS messages for which they do not incur any premium or standard messaging charges from their wireless carrier.

→ **Global Positioning System (GPS)**  
A system of satellites, computers and receivers that can determine the latitude and longitude of a given receiver (within its system) located on Earth.

→ **Global System for Mobile Communications (GSM)**  
A digital mobile standard developed and widely used in Europe. One of the main 2G digital wireless standards.

→ **iMode**  
A packet-based information service developed by Japanese operator NTT DoCoMo to deliver a wide range of services to mobile subscribers. The revenue sharing model used for iMode is being adopted by

other operators as the basis for the new services enabled by GPRS and 3G.

→ **Jump Page / Landing Page**  
The page or view to which a user is directed when they click on an active link embedded in a banner, web page, email or other view. A clickthrough lands the user on a jump page.

→ **Location Based Services (LBS)**  
A range of services that are provided to mobile subscribers based on the geographical location of their handsets within their cellular network.

→ **Messaging**  
Collectively, SMS and MMS messages sent to mobile phones/devices.

→ **Mobisodes**  
Original, made-for-mobile programming/episodes. Usually created by TV networks and movie studios to cross-sell popular TV and film properties/franchises.

→ **Mobile TV**  
Television/Video programming formatted for the mobile screen. Program is streamed or broadcasted via various platforms, such as MediaFlo and DVB-H.

→ **Mobile Virtual Network Operator**  
A mobile service provider that leases/uses the network infrastructure of a major mobile carrier. Examples in the US are Ampr'd mobile devices equipped with a special chip to send and receive information wirelessly over short-ranges, used in interactive outdoor posters.

→ **Off Portal**  
A mobile internet site that is outside the operator's portal.

→ **On Device Portal**  
The portal infrastructure is downloaded to the handset, using a technology such as Java or Flash. Some data is cached on device, so no connection is required for the user to browse the basic content set. The user connects to get updates.

→ **Page View**  
Unit of measure that tracks the number of times users load a particular web or WAP site/page.

→ **Premium Short Message (Reverse SMS)**  
Billing mechanism by which the mobile subscriber is charged above standard text messaging rates for mobile content and/or subscription.

→ **Pre-roll**  
The streaming of a mobile ad clip prior to the mobile TV/video clip. The mobile ad is usually 10-15 seconds.

→ **Pull Messaging**  
Any content sent to the wireless subscriber upon request, shortly thereafter, on a one time basis.

→ **Push Messaging**  
Any content sent by or on behalf of advertisers and marketers to a wireless mobile device at a time other than when the subscriber requests it.

→ **Revenue Share**  
Each party behind the mobile marketing initiative splits the revenue derived from the mobile marketing program.

→ **Smishing (SMS Phishing)**  
A security attack in which the mobile subscriber is tricked into downloading a Trojan horse, virus or other malware onto his/her handset.

→ **Symbian**  
An advanced open standard operating system for data enabled handsets.

→ **WAP 2.0**  
An increasingly popular format of choice for mobile web. Relies on a new set of standards more in line with internet standards. Used by HTML, mobile carriers, content providers and media companies, it can present content and functionality in more robust formats via faster wireless technologies.

→ **WAP Site**  
A website that is specifically designed and formatted for display on a mobile device.

→ **Widget (mobile)**  
Third party lightweight web application that can be embedded in a 3G mobile phone.

## TOP 20 OPERATORS

OPERATORS	SUBSCRIBERS (m)	COUNTRIES
China Mobile (China)	443.0	China (inc. Hong Kong), Pakistan
Vodafone (UK)	260.4*	Europe, Faroe Island, India, US, South Africa, Australia, New Zealand, Turkey, Egypt, Ghana, Fiji, Lesotho, Mozambique
Teléfono (Spain)	188.9	Spain, South America, Ireland, Germany, UK, Czech Republic, Morocco, Slovakia
América Móvil (Mexico)	172.5	US, South America
China Unicom (China)	171.8	China
Telenor (Norway)	159.0*	Norway, Sweden, Denmark, Hungary, Montenegro, Serbia, Russia, Ukraine, Thailand, Bangladesh, Pakistan, Malaysia
TeliaSonera (Sweden/Finland)	127.9*	Norway, Sweden, Denmark, Finland, Estonia, Latvia, Lithuania, Spain, Central Asia
T-Mobile (Germany)	126.6	US, UK, Germany, Poland, Czech Republic, Netherlands, Hungary, Austria, Croatia, Slovakia, Macedonia, Montenegro, Puerto Rico, and US Virgin Islands
Orange/France Telecom (France)	117.6	Europe, Israel, Egypt, Ivory Coast, Jordan, Cameroon, Botswana, Madagascar, Mali, Senegal, Mauritius, Réunion, Martinique, French Guiana, Saint Kitts and Nevis, and
MTS (Russia)	91.7*	Russia, Ukraine, Belarus, Uzbekistan, Turkmenistan, Armenia
MTN Group (South Africa)	80.7	Iran, Liberia, South Africa, West Africa
Bharti Airtel (India)	77.4	India, Seychelles, Jersey, Guernsey, Sri Lanka
Orascom Telecom (Egypt)	77.0	Algeria, Bangladesh, Egypt, Pakistan, Tunisia, Zimbabwe
AT&T Mobility (US)	74.9	US, Puerto Rico, US Virgin Islands
Verizon Wireless (United States) Excluding ALLTEL	70.8	US
SingTel (Singapore)	70.8*	Singapore, Australia, India, Indonesia, Thailand, Philippines, Bangladesh, Pakistan
Telecom Italia / TIM (Italy)	70.6	Italy, Brazil, San Marino, Vatican City
VimpelCom / Altimo (Russia)	57.8	Russia, Kazakhstan, Ukraine, Uzbekistan, Tajikistan, Georgia, Armenia, Vietnam, Cambodia
NTT docomo (Japan)	54.0	Japan, Bangladesh
Turkcell	50.5*	Turkey, Ukraine, Belarus, Northern Cyprus

\* Proportionate subscriber number

## KEY MARKETS

FRANCE	Operators	Subscribers (m)
	Orange	24.2
	SFR	19.3
	Bouygues Télécom	8.9

US	Operators	Subscribers (m)
	AT&T	74.9
	Verizon Wireless	70.8
	SprintNextel	50.5

GERMANY	Operators	Subscribers (m)
	T-Mobile	36.0
	Vodafone	34.4
	O2	13.0

MEXICO	Operators	Subscribers (m)
	Telcel	52.9
	Movistar	14.7
	Lusacell	4.1

ITALY	Operators	Subscribers (m)
	Telecom Italia	36.0
	Vodafone	23.1
	Wind	15.3

BRAZIL	Operators	Subscribers (m)
	Vivo	42.3
	Claro	35.7
	TIM	35.2

RUSSIA	Operators	Subscribers (m)
	Telenor, MTS	61.4
	VimpelCom/Altimo	41.8
	MegaFon	37.0

CHINA	Operators	Subscribers (m)
	China Mobile	443.0
	China Unicom	171.8
	China Telecom	42.4

SPAIN	Operators	Subscribers (m)
	Movistar	23.0
	Vodafone	18.5
	TeliaSonera	0.4

JAPAN	Operators	Subscribers (m)
	DocMo	54.0
	KDDIau	30.5
	SoftBank Mobile	19.9

UK	Operators	Subscribers (m)
	Vodafone	18.5
	O2	18.4
	T-Mobile	17.3

INDIA	Operators	Subscribers (m)
	Bharti Airtel	74.8
	Reliance	54.3
	Vodafone	52.8

## PUREPLAYS

### AOL

→ **PLATFORM-A**  
Countries: UK, US  
www.platform-a.co.uk

### GOOGLE

→ **ADWORDS**  
Countries: Worldwide  
http://adwords.google.com

→ **ADSENSE**  
Countries: Worldwide  
www.google.com/adsense

→ **DOUBLECLICK MOBILE**  
Countries: Worldwide  
www.doubleclick.com/products/mobile

### MICROSOFT

→ **MICROSOFT MOBILE ADVERTISING**  
Countries: Europe, US  
http://advertising.microsoft.com/europe/advertising

### NOKIA

→ **NOKIA INTERACTIVE ADVERTISING**  
Countries: Worldwide  
www.advertising.nokia.com

### YAHOO

→ **YAHOO! MOBILE NETWORK - DISPLAY**  
Countries: Worldwide  
http://uk.media.yahoo.com/mobile.html

→ **YAHOO! MOBILE NETWORK - SEARCH**  
Countries: Worldwide  
http://uk.media.yahoo.com/mobile/search.html

### OPERATING SYSTEMS

→ **ANDROID**  
Countries: Worldwide  
http://code.google.com/android/

→ **IPHONE**  
Countries: Worldwide  
www.iphone.com

→ **PALM OS**  
Countries: Worldwide  
www.palm.com

→ **RESEARCH IN MOTION**  
Countries: UK, US  
www.rim.com

→ **SYMBIAN**  
Countries: Worldwide  
www.symbian.com

→ **WINDOWS MOBILE**  
Countries: Worldwide  
www.microsoft.com/windowsmobile

## NETWORK AGENCIES

### AEGIS-ISOBAR

→ **ION GLOBAL**  
Countries: South Korea  
www.ionglobal.com

→ **ISOBAR MOBILE**  
Countries: US  
www.isobar.net

→ **MARVELLOUS**  
Countries: UK, Europe  
www.marvellousmobile.com

→ **TRIGGER**  
Country: South Africa  
www.trigger.co.za

### HAVAS

→ **MOBEXT**  
Countries: UK, Spain, France, Portugal, Netherlands, USA, Brazil, Mexico, Argentina  
www.mobext.mobi

### INTERPUBLIC GROUP

→ **ANSIBLE**  
Country: US  
www.ansiblemobile.com

→ **HUGE**  
Countries: US, UK  
www.hugeinc.com

→ **INTERPUBLIC EMERGING MEDIA LAB**  
Country: US  
www.ipglab.com

→ **R/GA**  
Countries: Worldwide  
www.rga.com

### OMNICOM

→ **AGENCY.COM**  
Countries: Belgium, China, Italy, Netherlands, UK, US  
www.agency.com

→ **CRITICAL MASS**  
Countries: Canada, UK, US  
www.criticalmass.com

→ **IPSH**  
Country: US  
www.ipsh.net

→ **MANGO MOBILE**  
Country: US  
www.mangomobile.com

→ **MOBILE BEHAVIOR**  
Countries: Worldwide  
www.omnicommediagroup.com

→ **OMG DIGITAL**  
Countries: Worldwide  
www.omnicommediagroup.com

→ **ORGANIC**  
Countries: Canada, US  
www.organic.com

→ **RED URBAN**  
Countries: Germany, Netherlands, UK, US  
www.redurban.com

→ **TRIBAL DDB**  
Countries: Worldwide  
www.tribalddb.com

## PUBLICIS GROUP

### PHONEVALLEY

Countries: US, Europe, China, India, Singapore  
www.phonevalley.com

### WPP

→ **24/7 REAL MEDIA**  
Countries: Worldwide  
www.247realmedia.com

→ **DYNAMIC LOGIC**  
Country: US  
www.dynamiclogic.com

→ **EVISION**  
Country: China  
www.wpp.com

→ **ICONMOBILE**  
Countries: US, Germany  
www.iconmobile.com

→ **JUMP TAP (WPP INVESTMENT)**  
Countries: Israel, Spain, Sweden, US  
www.jumptap.com

→ **KINETIC MOBILE**  
Countries: UK, US  
www.kinetic-mobile.com

→ **LIGHTSPEED**  
Countries: Australia, France, Germany, UK, US  
www.lightspeedresearch.com

→ **NEO@GOLVY**  
Countries: Worldwide  
www.golvly.com

→ **OGILVY INTERACTIVE**  
Countries: Worldwide  
www.ogilvy.com

→ **QUASAR**  
Country: India  
www.quasar.co.in

→ **SCHEMATIC**  
Countries: UK, US  
www.schematic.com

→ **STUDIOCOM**  
Countries: US, Colombia  
www.studiocom.com

→ **VML**  
Country: US  
www.vml.com

→ **BOOM**  
Countries: Bulgaria, Georgia, Netherlands, Russia, Ukraine, Kazakhstan, Moldova, Turkey  
www.boomad.net

→ **BSPCO**  
Country: UK  
www.bspco.net

→ **CARLSON MOBILE**  
Countries: Australia, Canada, Singapore, UK, US  
www.themobileagencyofrecord.com

→ **CASEE**  
Country: China  
www.casee.com

→ **CHACHA**  
Country: US  
www.chacha.com

→ **COME AND STAY**  
Country: US  
www.comeandstayusa.com

→ **CPX INTERACTIVE**  
Country: US  
www.cpxinteractive.com

→ **ECHOVOX**  
Country: US  
www.echovox.com

→ **EKOBUZZ**  
Country: US  
www.ekobuzz.com

→ **MOBILE MARKETING ASSOCIATION**  
Countries: Worldwide  
www.mmaglobal.com

→ **OPEN HANDSET ALLIANCE**  
Countries: Worldwide  
www.openhandsetalliance.com

→ **THE SYMBIAN FOUNDATION**  
Countries: Worldwide  
www.symbianfoundation.org

## INDEPENDENTS

→ **12SNAP**  
Country: Germany  
www.12snap.com

→ **21 COMMUNICATIONS**  
Country: China  
www.21cms.com

→ **3CINTERACTIVE**  
Country: US  
www.3cinteractive.com

→ **4INFO**  
Country: US  
www.4info.net

→ **4TH SCREEN**  
Country: South Africa  
www.4th-screen.com

→ **ADMOB**  
Countries: Germany, UK, US  
www.admob.com

→ **AD INFUSE**  
Countries: UK, US  
www.adinfuse.com

→ **AD.IQ**  
Country: UK  
www.adiglobal.com

→ **AKQA MOBILE**  
Countries: UK, US  
www.akqa.com

→ **AMOBEE**  
Countries: UK, US  
www.amobee.com

→ **ARVATO MOBILE**  
Countries: Brazil, Germany, Italy, Spain, Russia, UK  
www.arvato-mobile.com

→ **ASPIRO**  
Countries: US, Sweden  
www.aspiro.com

→ **ATLAS INTERACTIVE NORTH AMERICA**  
Country: US  
www.ai-na.com

→ **BANGO**  
Countries: Europe, UK, US  
http://bango.com

→ **BLYK**  
Countries: Netherlands, UK  
www.blyk.com

→ **BOOM**  
Countries: Bulgaria, Georgia, Netherlands, Russia, Ukraine, Kazakhstan, Moldova, Turkey  
www.boomad.net

→ **BSPCO**  
Country: UK  
www.bspco.net

→ **CARLSON MOBILE**  
Countries: Australia, Canada, Singapore, UK, US  
www.themobileagencyofrecord.com

→ **CASEE**  
Country: China  
www.casee.com

→ **CHACHA**  
Country: US  
www.chacha.com

→ **COME AND STAY**  
Country: US  
www.comeandstayusa.com

→ **CPX INTERACTIVE**  
Country: US  
www.cpxinteractive.com

→ **ECHOVOX**  
Country: US  
www.echovox.com

→ **EKOBUZZ**  
Country: US  
www.ekobuzz.com

→ **MOBILE MARKETING ASSOCIATION**  
Countries: Worldwide  
www.mmaglobal.com

→ **OPEN HANDSET ALLIANCE**  
Countries: Worldwide  
www.openhandsetalliance.com

→ **THE SYMBIAN FOUNDATION**  
Countries: Worldwide  
www.symbianfoundation.org

→ **EL2**  
Country: Poland  
www.el2.pl