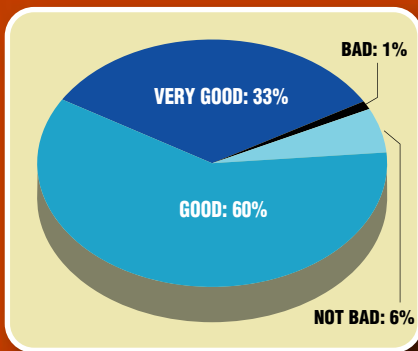


HIGHLIGHTS

May-05 Jun-05 Jul-05 Aug-05 Sep-05 Oct-05 Nov-05 **Dec-05** Jan-06 Feb-06 Mar-06 Apr-06 May-06 Jun-06 Jul-06 Aug-06 Sep-06 Oct-06 Nov-06 **Dec-06** Jan-07 Feb-07 Mar-07 Apr-07 May-07 Jun-07 Jul-07 Aug-07 Sep-07 **Oct-07** **Nov-07** **Dec-07** Jan-08 Feb-08 Mar-08

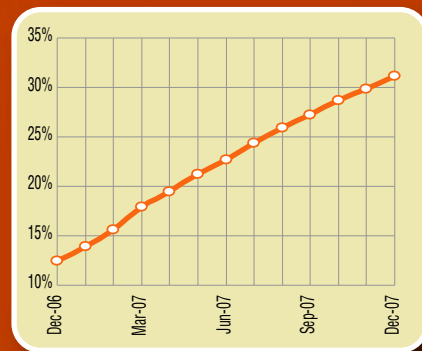
In This Issue: 2007 in Retrospect



Satisfaction with the T-DMB Video Quality



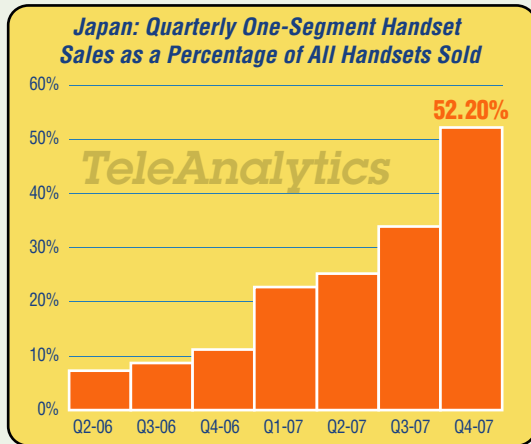
Hyon D5: The First Non Cellular Terminal Fully Subsidized by a MNO (three year subscription required)



T/S-DMB Population Penetration in the Common Seoul Coverage Area (population: ~24M)

MOTV TRACKING SERVICE





Monday, April 21, 2008

TORONTO, Canada: Issue No. 4 of the quarterly TELEANALYTICS MoTV TRACKING SERVICE (TMTS) was released in April 2008. TMTS tracks and analyzes facts and figures for all commercial Mobile TV (Broadcast) networks around the world on a monthly basis. Issue No. 4 analyzes the Q4-07 adoption figures, summarizes the key Mobile TV developments up until the end of March 2008, and provides a detailed quantitative analysis of the MoTV-2007 year as a whole. Also, as of Issue No 4, a new section has been added with up-to-the-release date analysis of upcoming MoTV deployments (2008).

Some Highlights from Issue No. 4

(All figures refer to MoTV Broadcast networks)

World. The total number of MoTV users at the end of 2007 was 26.34 million, as compared to 6.98 million at the end of 2006 and 490,000 at the end of 2005.

Europe. In 2007 the monthly European market share of the worldwide MoTV User basis ranged between 3.7% and 5%. DVB-H accounted for 3.57% of the MoTV devices sold in the year.

US: No official FLO adoption data has been released yet, but most speculations for the end 2007 figure are in the 100K-150K sub (Verizon) range. ICO-G1 (DVB-SH) was successfully launched on the 15th of April, just in time for the NAB. After a series of delays, AT&T appears ready to launch FLO on the 4th of May 2007. The development of the ATSC-M/H standard is apparently slipping to 2009, but journalistic hype is already in good shape and some journalists already see ATSC-M/H reaching mobile terminals up to 40 miles away.

Japan: In Q4-07 Japanese MoTV (One Seg) broke many of its own records and the November 2007 One-Seg handset sales went over the 3 million unit mark for the first time. Equally important, in Q4-07 Japanese One-Seg handset sales accounted for more than 50% of all Japanese handsets sold for the first time (figure at left). Contrary to the financially troubled T/S-DMB deployments across the Korean Straits which often attract the attention of the general media, the Japanese MoTV explosion that was financially healthy from the beginning (Broadcasters) is seldom mentioned. In any event, in Q4-07 the Japanese One-Segment market absorbed 77% of all the MoTV devices sold worldwide.

Korea: The end-2007 combined S/T-DMB population penetration in the Seoul Capital Area (~24M POP) reached 31.2%, and the corresponding 2007 population penetration gain was 18.7%. In March 2008, SKT decided to invest \$55 million more in the troubled TU media, which faced the imminent danger of failing to meet the minimum capital requirements set by Korean Law. As analyzed in detail by TeleAnalytics before, T-DMB is not in any better financial shape (notwithstanding a usage explosion) and in April 2008 the two sides started negotiations towards the creation of a mixed PAY-FTA Korean MoTV model. In 2004-5 both the Korean government and SKT were adamantly opposed to such a possibility.

Italy: The Italian end 2007 DVB-H subscriber total reached 60% of the forecast that was put forward by one of the two DVB-H licensees (as late as June 2007). The Italian DVB-H growth engine, 3-Italy, slowed down and official data released by the operator shows an average monthly number of 52,000 new DVB-H adds in the Jan-Aug. 2007 period but the same figure dropped down to approximately 20,000 in the balance of 2007. In any event, the 3-Italy end-2007 DVB-H subscriber count still represents about 40% of its postpaid mobile subscriber basis. In January 2008, 3-Italy and RAI started an Alcatel-driven DVB-SH trial in Turin, Italy. 3-Italy's UHF DVB-H network is estimated to compromise at least 1,300 transmitters, while RAI is the owner of a rather sparse T-DMB infrastructure. DVB-SH can be deployed from 3G rooftops, it can use all the existing rooftop 3G infrastructure (including antennas), and when deployed with a suitable transmitter density, it can potentially do a better job indoors than mainly tower-based DVB-H deployments.

For a brochure of the current **TeleAnalytics MoTV Report** please [click here](#)
 For a brochure of the **TeleAnalytics MoTV Tracking Service** please [click here](#)