

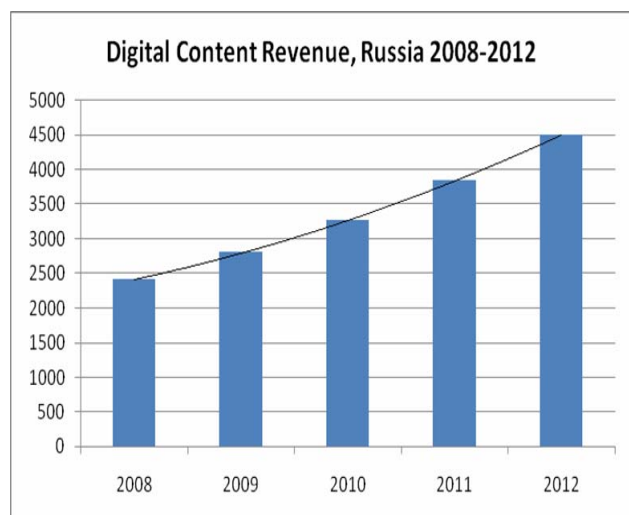


On July 21<sup>st</sup> 2008, J'son & Partners [J&P] announces the release "Digital Content Market Russian Federation 2008-2012" **FIRST EDITION** covering digital content market segments and e-commerce in Russia.

**According to J'son & Partners the DC market in Russia already features over 55 commercially launched mass market DC services and accounts for over 2,4 Bln USD sales/service fees turnover.<sup>1</sup>**

Retail piracy for popular content such as Games, Video and Audio established the initial market rules for structure/distribution, pricing models, localized content and portfolio in Russia. Digital Content Business via Internet and other digital channels is now starting to conquer the market previously held by illegal DC businesses<sup>2</sup>. J&P estimates that the legal DC business will take market lead within the next 2 years. A legal environment is critical for all copyright holders and, maybe even most important, for new Russian DC start-ups which could become real players on the Russian content market in the future.

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Legal Digital Content Services now experience strong growth averaging 35-40% year-to-year end, according to J&P field researches and leading DC market players interviewed for the report. **Broadband growth**, increases in **disposable income** growth among **Russian online consumers**, active **anti piracy policies** and a **higher trust** in e-business will guarantee high growth rates for legal DC businesses in 2008-2012.

**J'son & Partners forecast a 4,5 Bln<sup>3</sup> USD DC Market Size by 2012**. Market players now active in adjacent content and service areas such as IPTV and Wireless will provide additional boost to DC market as they are expected to **expand their business to the Internet/Web space**.

Source: J'son Partners

**About the Report:** In this report, J'son & Partners focus on Digital Content provided via Internet/Web Mobile/Wireless and Cable TV channels. The report was written by JP Consulting Digital and Mobile Teams and using extensive field research and industry data from JP Labs. J&P does not include large piracy based projects (music, video, soft and multimedia) in our market value calculations.

*See also: J'son & Partners Digital TV Report, Mobile Content Report.*

According to J&P research, the further growth of the legal DC market will largely depend on anti piracy activities and measures by major Licensors, the proper adoption of local market payment solutions, attractive and "state-of-art" product offering/selection made by DC companies, support of authorities providing consistent and transparent legislation grounds for DC business development.

**The «Digital Content Russia, 2008-2012» Analytical Report describes current Digital Content market worldwide, key market trends and solutions. The reports provides detailed overview of the legal Russian Digital Content market, focusing on virtual commodities classified by type of content and revenue generation model. Russian DC market is structured and classified according to the latest field research data on commercial activities and potential of currently launched projects and businesses, as well as socio-demographic data for online consumers. The report sources include: key market players data, J&P field research data, expert opinions of the DC market and J&P analytics.**

To buy the report and/or information, please contact Yulia Ozerova [yozerova@json.ru](mailto:yozerova@json.ru)

**Who shall buy this Report:** Investors, Internet Business, Digital Content Providers, Digital Content Distributors, Mobile Operators, Game Producers, Retail Channels, Payment Systems, ISPs, DC Vendors. Cable Companies etc.



<sup>1</sup> Based on key accounts turnover information for companies featuring profile DC business (e.g. direct commercial DC activities including Retail and Digital Connectivity)

<sup>2</sup> Current piracy share in the DC market reaches over 75% where the major share refers to end-user piracy (file sharing) slowing down the industry growth.

<sup>3</sup> J&P does not include large piracy based projects (music, video, soft and multimedia) in our market size/value calculations.