

The Business Potential Of Mobile Entertainment In China Market

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Abstract

This paper provides an exemplificative analysis of the effects of Mobile Entertainment in China. The analysis is also based on some successful business cases. Leading telecommunications operators and value-added service service/content providers in China are profiting from new business model & industry cooperation. A major finding is that Mobile Entertainment will drive a rising market, meanwhile it is possible that Mobile Entertainment based on 3G solutions will be a new trend. Consequently, there is a giant business potential in China Mobile Entertainment market.

Keywords: Mobile Entertainment, China Market.

1. Introduction Of Mobile Entertainment

For years, as a bad result of network bubble and 3G bubble, global telecommunication industries have plunged into a big trick. In despite of global telecommunication industries still is experiencing a process of comeback, however, this big bubble's fragmentation cannot stop the development trend of telecommunication technologies & services, on the contrary, now, most telecommunication operators are efficiently growing in a rational way more and more, they are seeking a new profitable operation model that is adopting various value-added services.

1.1 Definition Of Mobile Entertainment

“Mobile Entertainment refers to entertainment related activities performed by end users over a mobile network and using mobile equipment such as handsets. This can include things like mobile games, media content consumption such as icons, ringtones, music, images or movie clips, chat and information services on relevant entertainment events.”¹

1.2 Why Mobile Entertainment

Since profit of mobile data communication takes a leading place in mobile communication total profit, a new integrating service model, that is Mobile Entertainment, already became one of the most important topics for both mobile operators and wireless value-added service/content providers. Mobile data communication services over the mobile network such as mobile games playing, wireless music downloading, mobile phone TV playing, Mobile

Phone Novel reading, and so on, these services are impacting the traditional entertainment industry and attracting telecommunication operators' clients. Mobile Entertainment is bring a new challenge to both telecommunication industry and entertainment industry, that is, in the near future, telecommunication operators must enable themselves to hold more mobile network users and more entertainment customers on a large scale.

How to find a future growth point in order to improve the continual increase of business operation? This is a common task for global telecommunication operators. For this purpose, global telecommunication operators started to explore a new way to launch strategic value-added hotspot from service model. The basic idea is: Not only focusing on traditional telecommunication service fields such as voice service, also, the telecommunication industries must try their best to seek more possible business potentials from application service fields, continue to innovate technologies and service operations, then establish a new-style customer development model and business model.

2. The Current State Of The Mobile Entertainment In China Market

Currently in China, mobile customers are almost able to use all relevant services described in the definition of Mobile Entertainment. The rapid development of mobile communication techniques especially mature 2.5 G and expected 3G, will improve value-added service's technical base, enhance data transport speed rate, accelerate mobile terminal's upgrade, and drive more various value-added services. Presently, in China, around 74.8 % mobile communication users are also value-added service users. The iResearch provided a data report, it shows that during 2005, China has 29,400 millions mobile value-added users, the number of mobile value-added users will reach 36,000 millions in 2006 and 49,000 millions in 2008.² Yearly and nationwide, the CNNIC (China Internet Network Information Center) carries on an investigation in China Internet Users, these investigation reports showed that China's young people will be the major 3G users, and the youth between 18 and 25 years old are most interested in entertainment services of 3G, while 26-35 years old Chinese people are more interested in commerce service, searching assistance, and life information, etc.³ Therefore, it can be seen that Chinese young people will be the important clients for mobile entertainment service providers.

As two outstanding market examples, the current states and future forecast for China's mobile phone game users and mobile music users can be respectively described as following figures (Fig.1.⁴, Fig.2.⁵):

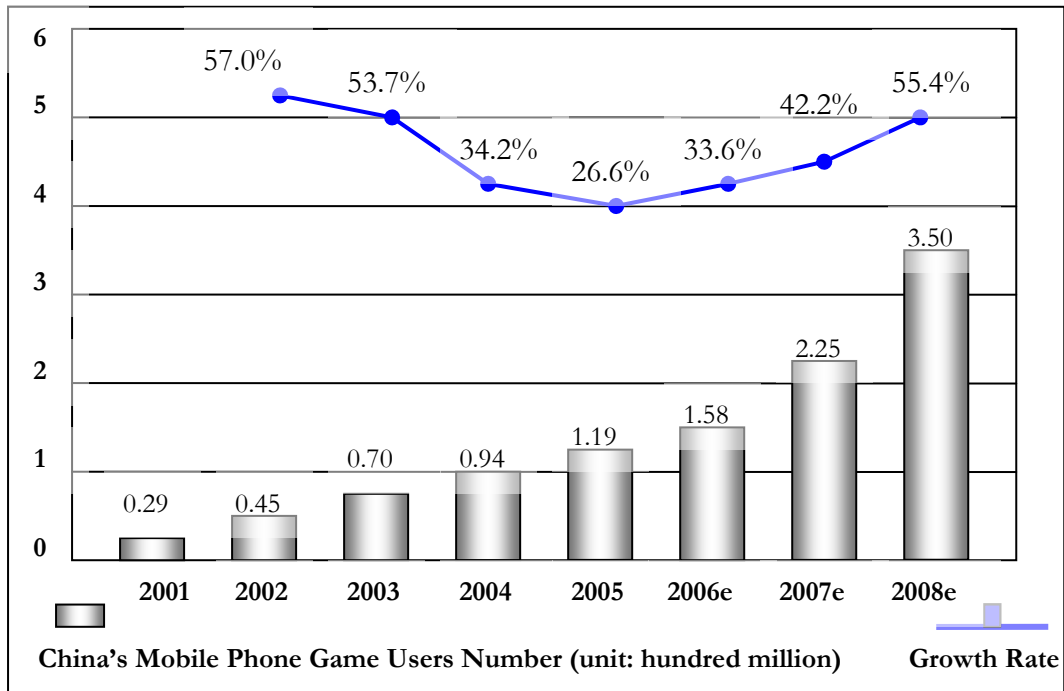


Fig.1. China Mobile Phone Game Users State & Forecast (2001-2008, source: iResearch)

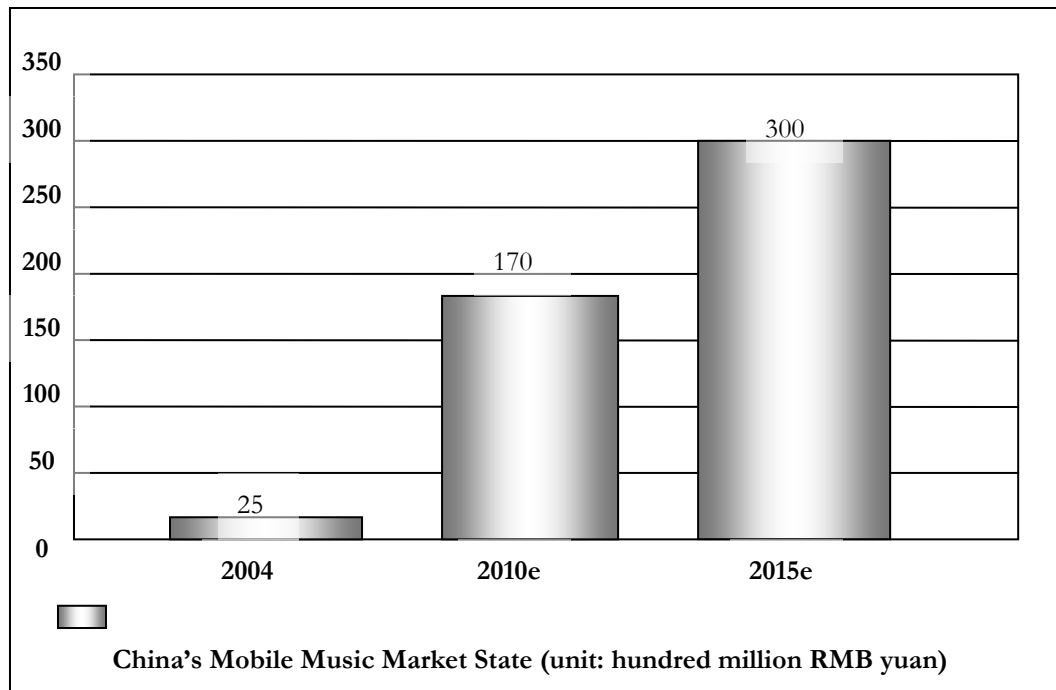


Fig.2. China Mobile Music Market State & Forecast (2004-2015, source: iResearch)

2.1 Mobile Entertainment Industry Value Chain

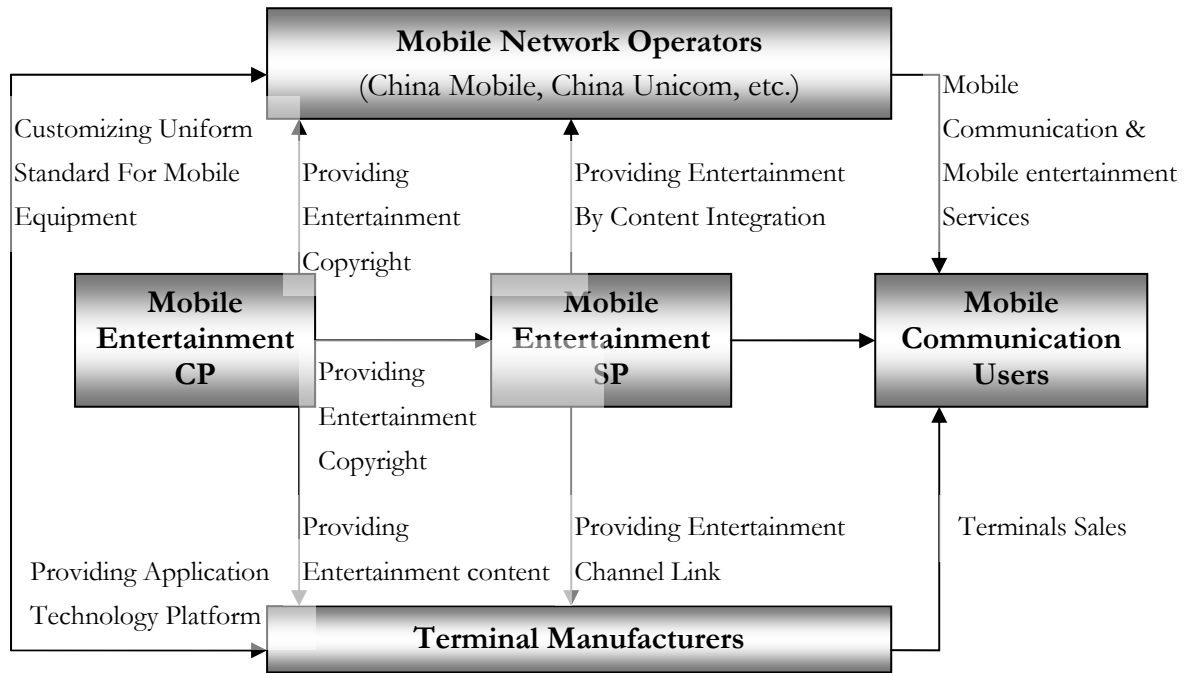


Fig.3. The Mobile Entertainment Industry Value Chain In China

The primary value chain of China mobile entertainment industry is composed of mobile network operators (leading mobile communication operators such as China Mobile and China Unicom, etc.), mobile entertainment content providers (CP), mobile entertainment service providers (SP), and mobile communication users. The secondary value chain of China mobile entertainment industry is made up of terminal manufacturers and mobile entertainment copyright/technology providers, etc. It is no doubt that development of the whole mobile entertainment industry depends on common efforts of each link and node of this value chain.

2.2 Business Drivers In Mobile Entertainment

For a long time and for China telecommunication industry, to compare with the increase value of total telecommunication service amounts, the increase value of telecommunication service revenues has decreased largely, telecommunication operators' ARPU (Average Revenue Per Unit) subsided to the bottom, therefore, it is imperative that mobile networks and technologies drive services to update.

The MII (Ministry of Information Industry of China) releases yearly various authoritative statistic reports about the operation state of China telecommunication industry. Following (Fig.4.) is a comparison of ARPU in the corresponding period (from 2004 to 2006) between fixed-communication and mobile-communication⁶:

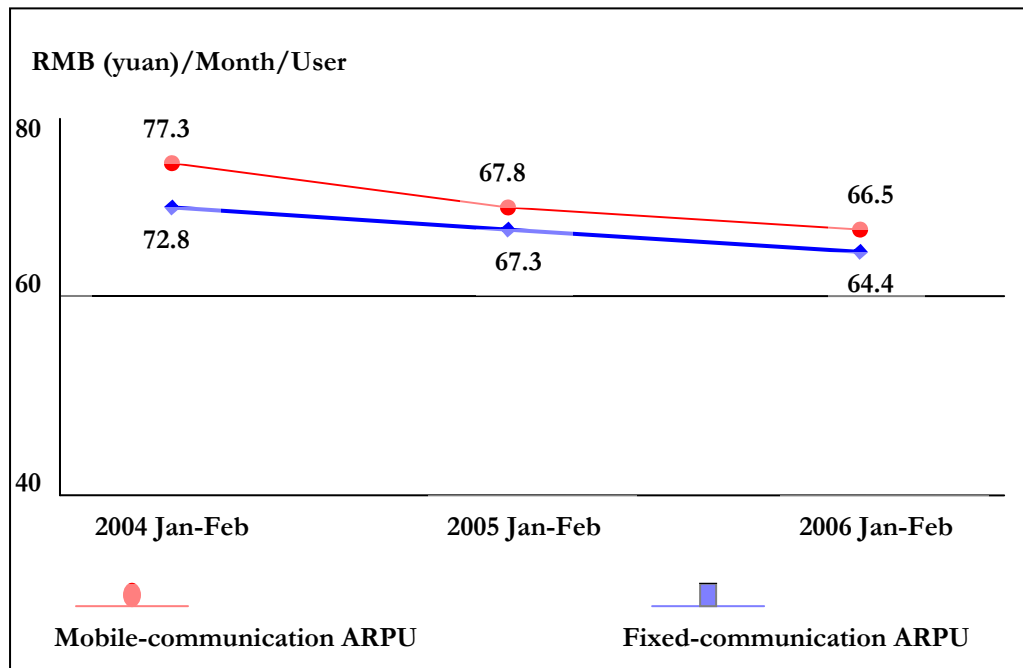


Fig.4. Comparison of ARPU During The Corresponding Period Between Fixed-communication & Mobile-communication, 2004-2006 (Source: The MII)

Note for above figure: ARPU value of fixed-communication was evaluated by the total income from China Telecom, China Netcom, and China Railcom. ARPU value of mobile-communication was evaluated by the total income from China Mobile and China Unicom. It is obvious that both ARPU values have a downtrend.

The MII also provided a state report of telecommunication industry operation during Jan-Feb 2006, and following figures is about the service structure of telecommunication services revenue (Fig.5. and Fig.6.) ⁶:

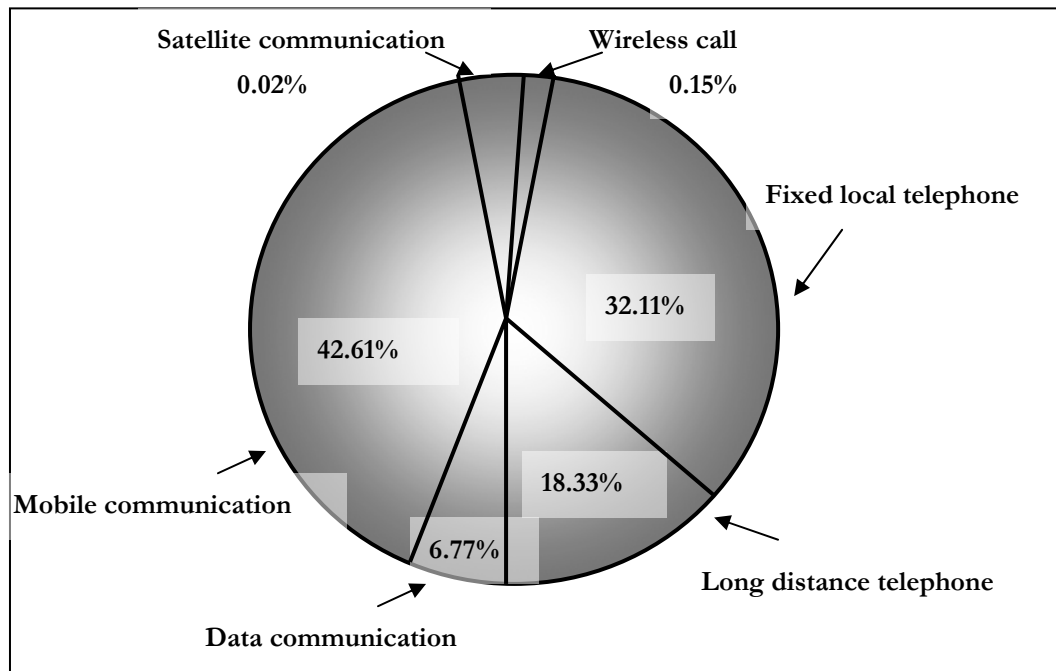


Fig.5. 2005 Jan-Feb, Structure of Telecommunication Services Revenue (Source: The MII)

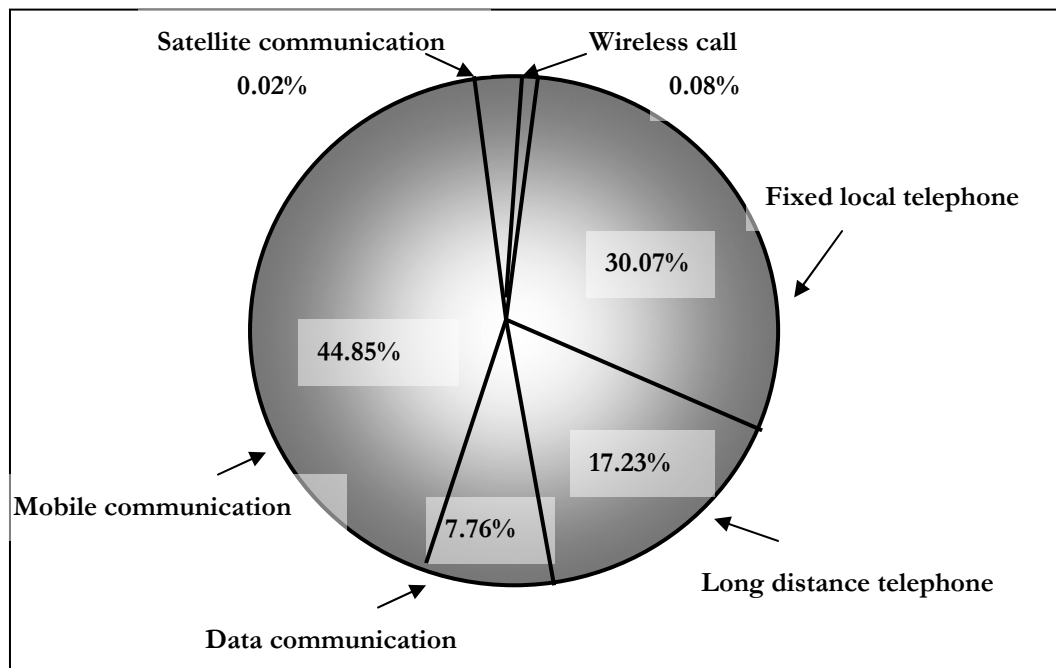


Fig.6. 2006 Jan-Feb, Structure of Telecommunication Services Revenue (Source: MII)

China has about 17,300 telecommunication value-added service providers. From above figures, it conducted to a comparison analysis, that is, only mobile communication profit and data communication profit are increased, and as a result of user structure change, the increase

speed of data communication still is the best of all operation fields. Especially, in mobile-communication field, mobile data service grows rapidly and its profit takes a big part of mobile communication services income, thus, if mobile communication services can adopt more multimedia data communication modes such as games, music, video services, and so on, it will help mobile network operators to retrieve their revenue and recover their user lost. Based on these kinds of service structure change, mobile entertainment solution can be an important new option.

2.3 Successful Business Cases

At present, it is no doubt that interactive entertainment is one of the hottest topics of mobile value-added service field, whatever operators and service/content providers, they are exploring their business strategy in order to implement a long-term and profitable industry value chain, for this purpose, all links and nodes of this industry value chain face a common key task: Industry cooperation and resource sharing, then the destination is all-win.

Many years ago, wireless entertainment service providers started to cooperate with mobile operators and other industries of the entire mobile entertainment industry value chain, provided relevant services such as SMS (Short Message Service) and MMS (Multimedia Messaging Service), these wireless data services became important value-added points for traditional mobile communication operation. Nowadays, this kind of industry cooperation currently is also making successful value-added upsurge for traditional entertainment industry (such as Television Stations, Records & Movie Companies, Computer Games Developers, etc.), thus, more and more mobile operators and service providers are focusing on those partners from traditional entertainment industry, due to those partners have a significant advantage to attract value-added service users: rich entertainment content and program resources. Not only entertainment, even any other traditional industries are also possible to become a participant in mobile entertainment industry. Furthermore, all sides have competitive potential and profitable prospect. Following will expatiate on two outstanding successful business cases in China market.

● A Typical Mobile Entertainment Business Success Based On Industry Cooperation: “Super Girl”

During summer 2005 in China, what is the most popular entertainment program on TV? The answer is “Super Girl”, and it is China's first nationally televised show, just like “American Idol”. “Super Girl” is hosted annually by state-owned Hunan Province Satellite Television

(also known as Hunan TV, located in Changsha, the capital city of Hunan Province, one of the most popular television station producing the well-known top-ranking entertainment programs such as TV/Music shows in China), and this “Super Girl” is yearly sponsored by a traditional dairy enterprise - The Mongolian Cow Dairy, thus, it has a interesting full title: “The Mongolian Cow Sour Yogurt Super Girl Contest”.

A major value-added operation contributing to the show's unprecedented popularity is that viewers are able to participate in the judging process by sending SMS via their mobile phones to vote for their favorite contestants, different mobile network users were charged different text message service fees, for China Mobile users the price is 1 RMB yuan/vote, for China Unicom users the price is 0.5 RMB yuan/vote, for other operators the cost is 0.5 RMB yuan/vote to 3 RMB yuan/vote, etc. ⁷ During the preliminary round in Chengdu(the capital city of Sichuan Province) alone, 307,071 message votes were sent respectively for the top three contestants, each vote costs voter 0.5 RMB yuan to 3 RMB yuanT. After sent a support text message, each voter's mobile phone was also automatically subscribed to a binding relevant value-added service for “Super Girl”, such as contestant news and program trailers, the cost is 6 RMB yuan per service. In addition, the final ranking of the contestants depends on the SMS support rate sent in by Fans, at last, according to a China state media's view rate investigation (CSM, offering TV & radio audience measurement research), more than 400 million people had watched the finale of the show, Fans voted via SMS, then the three finalists obtained more than 8 million votes. As a successful mobile interactive entertainment brand name, the interactive combination of television entertainment and mobile phones has proven to be a success key of the “Super Girl” business operation.

After ending of the show, the television station's SMS income from mobile message votes was approximately more than 30 millions RMB yuan (approximated 3.743 millions US dollar), this may account for 30%-50% of the total profit of the TV entertainment program, and this amount is almost equal to total advertisement income. For the big cake of SMS total profit, each participant from different industries reaped its own part in proportion with: 15% cut for China Mobile, 30% cut for China Unicom, 20% cut for China Telecom and China Netcom, the rest part is for the television station (Hunan TV) and others. ⁷

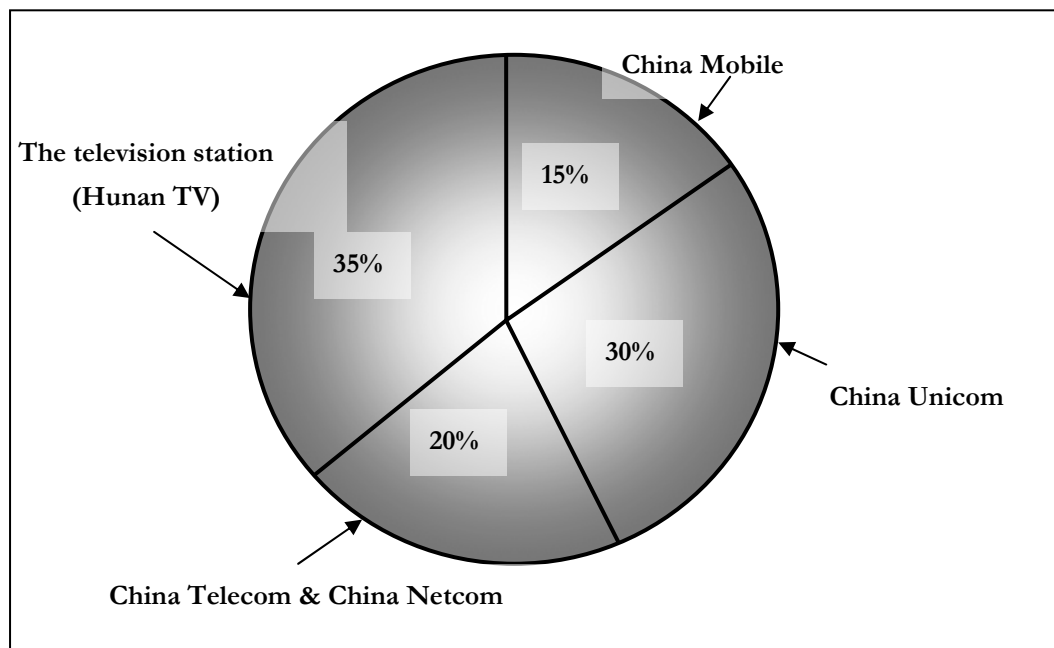


Fig.7. SMS Vote Revenue Distribution Structure Of “Super Girl” (Source: Hunan TV)

Hence, the “Super Girl” 2005 is a considerable successful interactive mobile entertainment business case in China. In a word, it is a typical all-win value-added business model: China’s traditional entertainment industry (such as Hunan TV) is a big winner, at the same time china’s telecommunication industry (China Mobile, China Unicom, etc.) is also a satisfied winner, even for traditional industry, The Mongolian Cow Dairy, this company has sold out more Yogurt and made a splendid record of brand marketing from the title right of the show, one more thing, maybe just as a successful result of leading marketing, The Mongolian Cow Dairy’s ex-director of marketing currently is the vice-president of marketing of Linktone, while Linktone is a famous mobile entertainment service provider in China market, it seems to be an interesting business operation transferring from dairy to entertainment. Traditional entertainment lacks of interaction but is rich in user attraction, equally, updated new-style mobile handset has increasingly excellent interaction but want rich service content creation, when both sides met each other, under a combination of advantages, a giant business opportunity emerged.

●The Way From Records CP to Mobile Entertainment SP: Rock Mobile

Rock Mobile Corporation is a Mobile Entertainment focused company, was founded in July 2002, headquarters in Guangzhou (the capital city of Guangdong Province), and provides consumers with mobile music service via 30 nationwide telecom networks in Greater China Region. It originally started as a digital division of Rock Records Group in January 2001 (Rock Records Group is the most recognized music brand name in the Greater China region,

has 25 years of experience in music business and 20% of China music market share).⁸ Then, after received a huge funding from Acer Technology and Siemens GmbH in 2002 and Walden International and Legend Capital in 2004, as a spun off of Rock Records Group, for years, Rock Mobile Corporation has further expanded the brand name of Rock in the wireless music entertainment market, its operation covers the whole Greater China market (including Mainland China, Hong Kong, and Taiwan). Rock Mobile's primary service content is: mobile entertainment service development, integrating entertainment with science & technology, and cooperating with relevant industries such as mobile operators, terminal manufacturers, SP(s), etc. In 2005, Rock Mobile was selected by Fortune Magazine as one of the top 10 "Cool Companies in China". In 2004, it became Top 5 RBT (Ring Back Tone) provider with 24 provincial connections in Mainland China. In 2002, Rock Mobile was awarded The Most Creative Mobile Service Provider Award from China Mobile, and also became the No. 1 Mobile Music Entertainment SP in Taiwan.⁸

Services & Productions of Rock Mobile:

- YOYORing (ringtones downloading)
- YOYOLook (logos, images downloading)
- Star Voices Releasing
- Song on Demand and Sending
- Kara OK Singing Online
- Entertainment News & Star Activities Subscription
- Star clubs, etc.

Major Industry Partners of Rock Mobile:

- **Operators:** China Mobile, China Unicom, Chunghwa Telecom, Taiwan Cellular Corporation, etc.
- **Records corporations:** BMG, EMI, SonyMusic, Universal, Warner, etc.
- **Software & Hardware Providers:** Oracle, Sun, Motorola, Nokia, Siemens, etc.

Rock Mobile is not only supported by the rich mobile entertainment resources from Rock Records Group, but also integrates its own accumulative experience and professional knowledge of entertainment industry with abundant resources from Top 5 Global Records Corporations (BMG, EMI, SonyMusic, Universal, Warner), thus, Rock Mobile has a quite strong advantage of business brand. To Compare with Rock Records Group's long-term financial crisis, Rock Mobile's operation scale increased apace in a high speed growth rate (average 948.67% per year) during last three years. According to the financial state from Rock Mobile, In 2004, Rock Mobile's yearly income was close to 9 millions US dollar, in last year (2005), it was more than 20 millions US dollar, and for this year (2006), it is expected that the yearly income to be 40 millions US dollar. Since it was founded, Rock Mobile is always focused on wireless music entertainment offering, at present, its income is mostly from mobile value-added services and copyright distributed sales, respectively cut 85% and 15% from total income.⁸

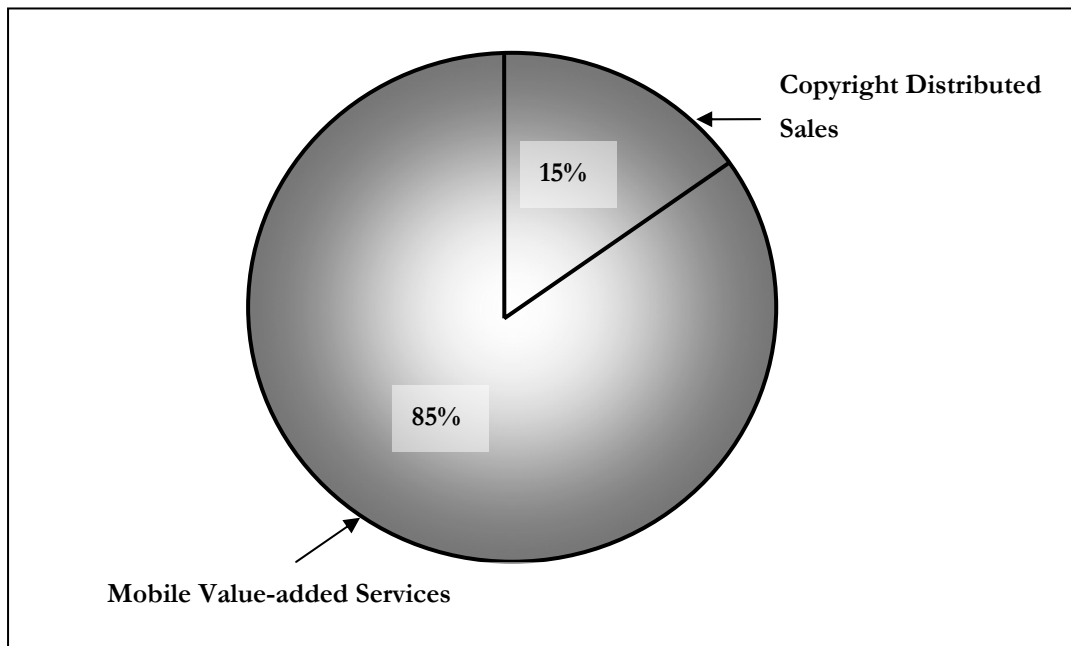


Fig.8. Revenue Structure Of Rock Mobile's Total Income (Source: Rock Mobile)

Other than other SP(s), due to Rock Mobile owns the sole agency of Rock Records Group, therefore, Rock Mobile's mobile entertainment services are developing rapidly, any other SP(s) would like to use any music resource of Rock Records Group, it (they) has (have) to negotiate with Rock Mobile at first. Currently, the business model of Rock Mobile still is B2B (Business to Business) that is cooperating with leading mobile operators and 130 nationwide broadcasting stations. But later, it will have a try for B2C (Business to Customer) then the terminal users are able to directly touch the brand name of Rock. In addition, to prepare for future 3G mobile entertainment market, Rock Mobile has cooperated with SonyEricsson to develop new-style mobile music phone, and digital music solution was provided by Rock Mobile. In Rock Mobile's opinion, this cooperation means that with official authorization from records companies, for this reason, mobile terminal manufacturers needn't to care about digital music solutions especially in copyright issues. In a word, the high speed rate of growth of Rock Mobile is based on that Rock Records Group has not only first-rank professional experience of music marketing, but also good industry cooperation relationship and unique copyright resource.

3. General Analysis Of The Mobile Entertainment In China Market

From the development state of current service models, user demands increasingly emerge to a multiform trend, thus, for providers, how to grasp market demand and satisfy users with their personalize demand will be a very important key in current aboil competition environment. Nowadays, more and more mobile network users are intending to access more multimedia and entertainment services, entertainment consumption will become a significant attraction

for more potential users, to launch Mobile Entertainment strategy into wider market, this is a strategic business trend for global telecommunication industries.

3.1 Opportunities And Risks In Mobile Entertainment

For most of mobile operators, Mobile Entertainment means a superexcellent value-added opportunity, and it is an important strategic investment for business model. Meanwhile, Mobile Entertainment also will face various challenges and potential risks. When mobile network operators deploy their networks to provide Mobile Entertainment service, its business model and industry value chain are certainly the key issue. The challenges in offering Mobile Entertainment are mostly associated with choosing the right business model, content copyright, customer support and economic environment rather than technology. For Mobile Entertainment industry, maybe the major challenges are increasingly complicated competition environment and changeful value chain, also including revenue sharing, copyright management, user loyalty, etc.

All in all, it is obvious that the user requirements and market potential will give an impetus to Mobile Entertainment. At the same time, global operators and other relevant participants are looking forward to receive rich profits from their huge investment in mobile entertainment industry.

Anyway, with the rapid development of 3G application services, new design of mobile terminals or mobile handsets and update of the next general network, now, Mobile Entertainment is no longer a novelty, meanwhile, Internet media, Internet entertainment and online-games become to a popular phenomenon. In Asia, especially in China, with the Olympic Games in Beijing 2008 and the World Exhibition in Shanghai 2010, together with more mobility, these lead Internet multimedia entertainment and Online-games application to emerge increasingly as a hotspot, therefore, these requirements from consumers have driven the development of mobile services. In order to welcome upcoming 3G times, Chinese telecommunication industries, for example, China Mobile and China Unicom, the leading mobile network operators in China, they are actively researching and exploring a lot of business trial plan in domestic market.

3.2 Mobile Entertainment Business Model

In China, usually, according to user service model & infrastructure, there are several different service networks: telecommunication network (mostly including fixed telephone network, broadband network, and mobile network), the Internet, broadcast& television network (cable TV network and radio network, etc.). For years, telecommunication broadband network has already been integrated with the Internet very well, so that, at presently, the major task is to make telecommunication mobile network integrating efficiently with the Internet and broadcast& television network further. Why it is profitable to integrate above service network

types? In the final analysis, network integrating accords with market actual demands: broadcast & television industry has inherent advantage in program contents creation, and that telecommunication and the Internet have advantage in network coverage and user distributing experience, thus no one of all sides can take whole market alone. Accordingly, Mobile entertainment can be adopted over all types of network, because good contents /services providers and experienced access operators will be the key of success, that is, actual demand is also the market driver for Mobile Entertainment.

A feasible and all-win business model is the key factor for Mobile Entertainment solution development. Currently, China's telecommunication operators, broadcasting & television stations, other content/service providers, and so on, they have already started to cooperate, but the detailed cooperation model still must be discussed and adjusted by common negotiation.

3.3 Technology & Strategy Issues In Mobile Entertainment

Besides the business model, value chain, and market demand are changeful, when providers implement Mobile Entertainment on a large scale, there are a lot of technical challenges need to be solved appropriately. For instance, Mobile Entertainment solution will relate to many different technologies and different technical standards, such as content storage/distribution techniques, mobile data transport techniques, DRM (Digital Right Management) techniques, encoding/decoding techniques, security/encryption techniques, etc.

For manufacturer, existing mobile terminals mostly are mobile phones, and for current mobile phone function design, still must to be enhanced with better audio & visual performance, higher data transport speed rate, stronger standard compatibility, and more convenient downloading method. As network terminals, PC (Personal Computer) has advantages of screen size and storage capability, while mobile handsets have better mobility to provide reachable online connection, and are able to support users to find any communication/ entertainment partners everywhere, therefore, portability & mobility enable mobile terminals to participate market competition with unique competitive power.

For mobile network operators, if they would like to make more profit from value-added services, then they need to offer not only voice communication, but also more amount of datastream, for example, adding more streaming media data downloading, and more support ability to attract mobile phone game users, etc. Mobile operators must install high speed network transport equipments and implement higher data transport rate, they also need to adapt advanced wireless and mobile network architectures solutions, although there are existing GPRS and 2.5G solutions, possibly, only after 3G solutions and 3G equipments are launched on a large scale, more complicated mobile entertainment service can be offered. In addition, operators also should set up a reasonable and user-friendly billing platform.

For mobile entertainment service providers (SP) and mobile entertainment content providers (CP), these providers have to continue to research market features, consumer habits, and choose appropriate software/hardware suppliers, in order to develop new productions and services for certain market and user clusters.

Anytime and anywhere, production's quality and service's content always are the fortune resources in relevant business & market, thus, powerful customer support groups are quite necessary for both operators and providers.

4. Analysis Of Operators

No doubt, China Mobile has an overwhelming majority in China market, whatever in marketing channel, market power, total number of SP, market share, total number of user, and so on. Until June 2005, the total user number of both China Mobile and China Unicom already reached to 344.3 hundred millions.⁹

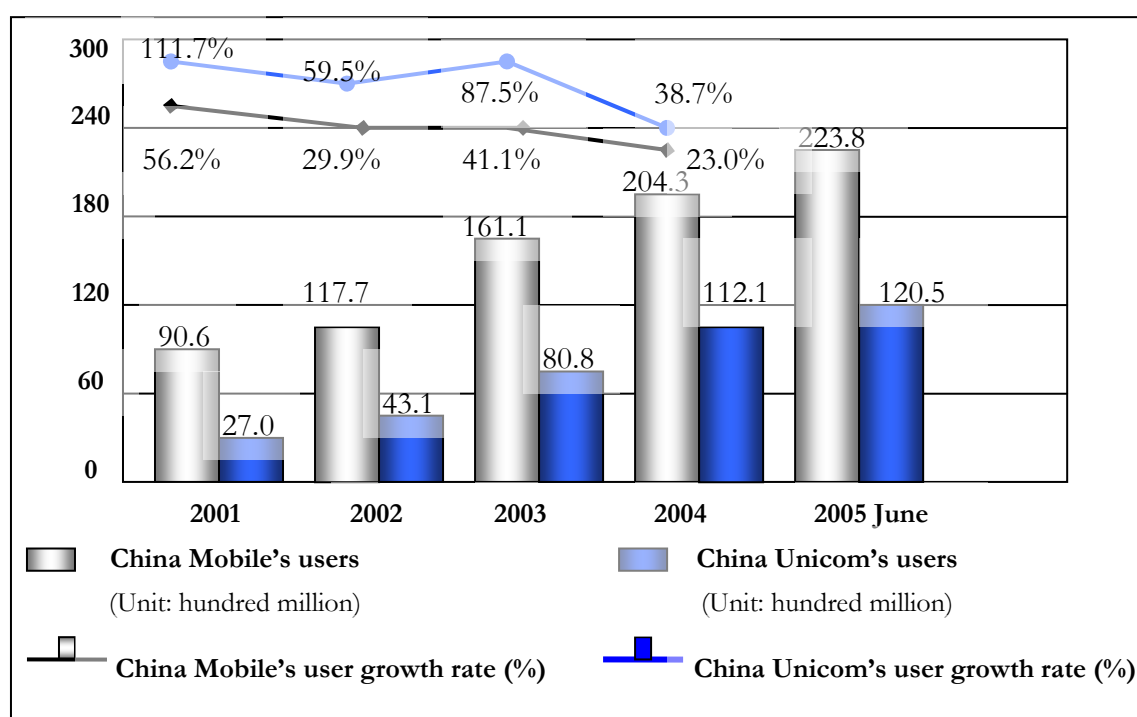


Fig.9. 2001-2005, User State Of China Mobile & China Unicom (Source: iResearch)

5. Analysis Of Service Providers(SP)

Currently, China's Mobile Entertainment service providers can be generally classified into:

- **Super Gateway Website SP:** Sina, Sohu, Netease, Tom, etc.

- **Integrated SP:** Integrating all kinds of value-added services and providing various mobile entertainment menus, such as Linktone, Digifun, Kongzhong, etc.
- **Independent Copyright SP:** All kinds of broadcasting & television stations, records & movie & game companies, and so on. Usually, these business organizations and professional companies mostly act as content providers (CP), but sometimes they also directly provide mobile entertainment services to users, such as interactive entertainment channels of television stations, wireless MP3 downloading website with payment agreement from entertainment companies (Rock Mobile, A8, etc.)
- **Professional SP:** Focusing on certain service (music downloading, mobile games playing, mobile phone novel reading, etc.), Such as Top100, Magma Digital, Ourgame, Shanda, and so on.
- **Mobile Operators Owning SP:** Such as Monternet and M-Zone (operated by China Mobile), Myuni and U-Power (operated by China Unicom), etc.

6. Analysis Of Content Providers (CP)

As above mentioned, China's mobile entertainment content providers (CP) mainly are all kinds of broadcasting & television stations, records & movie & game companies. In addition, there are some copyright agency organizations as well as a few personal studios for mobile entertainment creation with authorship, etc. Certainly, currently the former are overwhelming majority rather than the latter, and play a leading role in mobile entertainment value chain.

Mobile entertainment content is a key issue for profit increase, for this purpose, China's mobile entertainment content providers possibly have three development trends:

- To cooperate with terminal manufacturers or deploy OEM (Original equipment manufacturer), to launch special brands and appropriative marketing channels, etc. But, not all of mobile entertainment content providers have enough resource to adopt this model, and not all of terminal manufacturers are able to take in hand.
- Still as CP, this way enables mobile entertainment content providers to make profit directly, they just provide authorization and sale copyright to SP or operators, then they will rapidly get money via authorization, at the same time, they don't need to care about their technical weakness or pirate issue after copyright sales, these troubles will be consider by SP or operators. This is a long-term stable profitable model, but in a sense, also has controversial issues such as income sharing and profit redistribution.
- To be SP, that is, directly cooperate with mobile operators, to set up own service platform and sale own mobile entertainment production online. In this model, mobile entertainment content providers still have leading place of value chain, by directly connected to users, they can establish their own special service brands and appropriative marketing channels. It is useful for mobile entertainment content

providers to popularize themselves with terminal users. Of course, this model still with potential disadvantages just as above mentioned.

7. Analysis Of Terminal Market

Terminals act as an important role in Mobile Entertainment industry value chain. Global mobile handsets market is so hot that China mobile phone manufacturing cannot be an exception. The aboil competition made less and less profit for manufacturers, hence, new functions development and new-style design will bring a new profit growth point, so that, manufacturers started to produce more multimedia mobile phones. In January 2006, according to the statistic result from the MII, the total production amount of mobile handsets is 268.161 millions, and the rate of growth is 14% comparing with October 2005. Following (Fig.10.) is displaying a stable growth state of mobile handset output in China market from June 2005 to November 2005¹⁰:

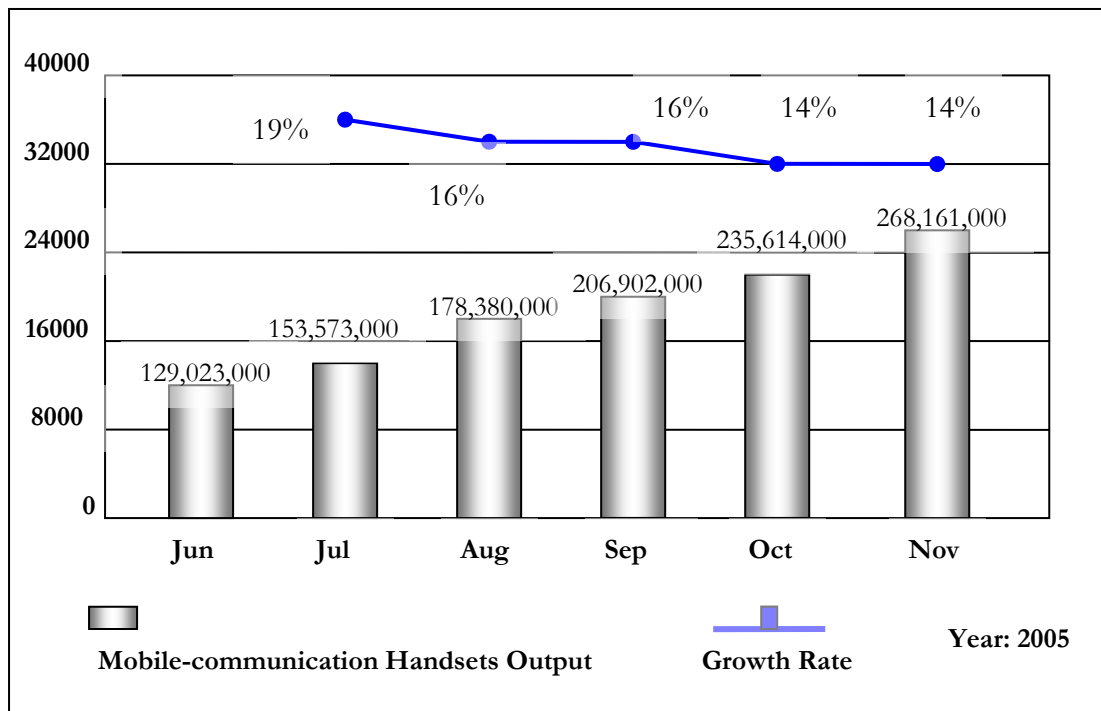


Fig.10. Mobile Handset Output In China Market, June-November 2005 (Source: iResearch)

8. Analysis Of Users

According to the market share, China's mobile entertainment service users mostly is China Mobile's customers, it takes major part of total mobile service users, while China Unicom's users take the second place.

Concerning some reasons for using mobile entertainment service, here is an illustration with CRBT (Color Ring Back Tone) case ¹¹.

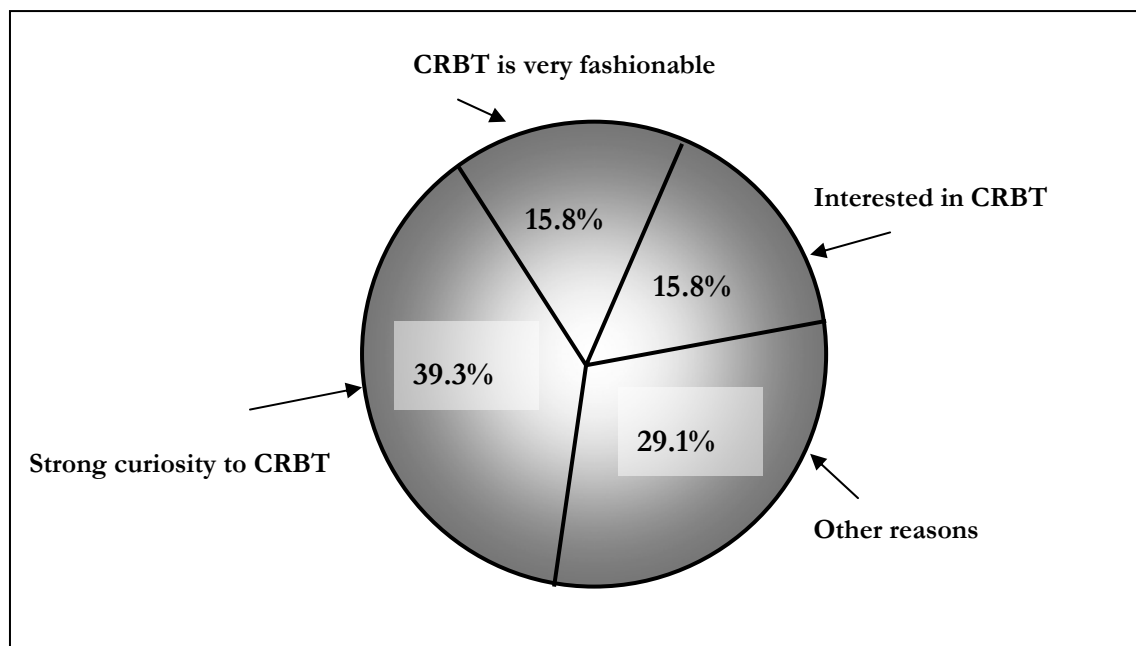


Fig.11. Reasons For Why Customers Use CRBT (Source: iResearch)

9. Conclusion And Future Prospect

At present, in order to carry out a all-win goal, there is a increasingly close industry cooperation between different participates in China's mobile entertainment value chain. Based on low labor cost, well-developed technical level, and giant domestic market, it is reasonable to expect a unique competition advantage of China's mobile entertainment industry with the globalization trend. In the meantime, quite a number of foreign mobile techniques providers and terminal manufacturers are longing to approach China's opportunities, many European and American companies are pressing for selling their mobile entertainment solutions into China market, even some of them already made a great progress: they got major orders from the leading China operators, or cooperated with China's mobile entertainment service providers. With 3G licenses granting from Chinese government in the near future, along with the Olympic Games in Beijing 2008 and the World Exhibition in Shanghai 2010, and so on, the large scale application of Mobile Entertainment solution is coming, hence, it is no doubt there is a huge business potential in China market.

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