



monetizing **connected** consumers

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VALUE-ADDED SERVICES

VAS, carrier billing and engagement – the new telemedia paradigm entertaining the iGeneration



Value added services (VAS), OTT content and sports are all driving a renewed interest in mainstream businesses for services such as direct carrier billing (DCB), affiliate marketing and other engagement strategies – proving a boon to telemedia companies globally.

Research by Juniper Research shows that, where DCB is being used, uptake of its functionality is being fuelled by bundled content such as Spotify – across Europe – and Netflix – in markets including the Philippines and Mexico. By using carrier billing for acquisi-

tion, OTT (Over-The-Top) content providers have reduced their marketing expenses, leveraging the brand name of local mobile operators.

In fact, the research shows that, with most

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MARKETING & PROMOTION

DCB and bulk SMS – the key to effective mobile marketing

Direct Carrier Billing is a channel that allows users to respond to a bulk SMS message with a direct purchase, according to bulk SMS and carrier billing specialist Mobivate.

Ever since the Apple iPhone was introduced in 2007, mobile payments have been on the rise. But direct carrier billing had been in use for years before this, allowing mobile phone users to make purchases quickly and without

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iGeneration

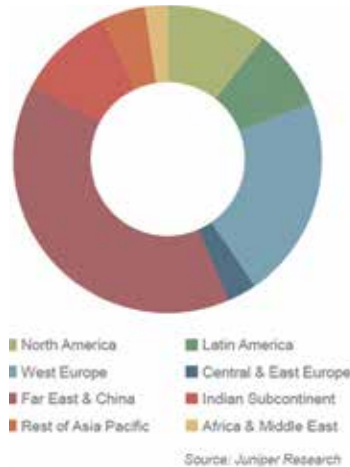
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leading app stores and content providers now seeking to enable carrier billing as an option, consumer spend via the mechanism is expected to rise from \$28 billion in 2018 to nearly \$90 billion by 2024.

The option is likely to be particularly popular in regions such as Latin America and the Indian Subcontinent, where it is likely to be a major facilitator of end user content spend.

However, even in markets such as the US, where card payments currently predominate, the convenience and increasing availability of carrier billing should see it frequently used for content subscriptions, as well as impulse purchases. As a result, carrier billed spend in the US is expected to more than double to \$8.6 billion by 2024.

According to Juniper Research, leading OTT players such as Netflix are understandably keen to explore the opportunities to spread their varied content to consumers worldwide. However, they have been heavily reliant



End User Spend on Carrier Billed Content, 2024, Split by 8 Key Regions (\$89.9 billion)

on card payments to monetise consumers, which has proved problematic when wanting to launch in emerging markets with low credit/debit card penetration.

“By entering into a partnership with a network operator and carrier billing provider, OTT content providers can reduce marketing costs by leveraging the strength of the brand names of local mobile operators,” says report author Windsor Holden. “In this business model, the OTT provider is able to reach the user base of the telecom operator and target its offerings to these subscribers, while simultaneously monetising its content through carrier billing. In emerging markets, such as India, OTTs have found that this approach has helped gain them presence in the market.”

Meanwhile, as more and more

VAS companies such as those in mobile gaming and dating embrace affiliate marketing to drive traffic and create new revenue streams, there is a growing interest in adding carrier billing to SMS and other push marketing to help instantly monetise interactions.

Push traffic and mobile messaging are increasingly crucial to driving traffic and instant monetisation is now key when they land. “60% of those [we] surveyed said that if given the choice, carrier billing would be their preferred payment method,” says Andreea Papillon, Product Manager at Peak, which conducted a study of Android users under 25.

She adds: “This is pretty impressive, as the study also revealed that comparatively, only 18% would opt for credit card and only 5% said they would prefer to use Google Pay.”



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Bulk SMS & DCB

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hassle upon receiving a premium SMS. Mobile content billing basically acts as a credit card, even if you don't have one. It offers the benefit of immediate purchase without the need for immediate payment. The seller is guaranteed to receive money through the mobile billing system, and the user can make the purchase without worrying about payment platforms or their current account balance. Since about 80% of all online purchases are impulse buys, direct carrier billing is a seller's dream.

In the last decade, we've gone from a world where the privileged few have iPhones, to one where it's the rare exception who doesn't. This means that online purchasing is more accessible than ever. Services and goods can be purchased through a wide variety of online apps,



and direct carrier billing has become the preferred payment solution for those seeking to monetize new apps. Plus, direct carrier billing is spreading out to the global market, becoming popular in the strongest nations across the world.

One of the greatest things about direct carrier billing is the element of convenience. It's fast and easy, no information to enter and no bank account details required. Completely secure and

requiring only a few seconds to move from impulse to purchase. That's just the start, though. It's completely transparent. You can see all costs in the phone bill, nothing hidden. It offers extremely low revenue leakage and high payouts. Customer care is simple, managed through the mobile network itself. This is a channel with flexible charging price points and a global reach of over 5 billion people, compared to only three billion with

credit cards.

"Since pretty much everyone has a smartphone these days, DCB makes the sale simple – simply include a call-to-action button in a bulk SMS," explains John H, of mobivate. "Offer your loyal customers something that they are likely to want with a bulk SMS. Then, just add a call-to-action button to the bulk message. With one simple text, a customer can take advantage of the deal. The purchase goes through immediately, and the price is added to the service bill for the cellphone or other mobile device. It couldn't be simpler."

The mobile market has tripled in value over the last three years, from about \$116 billion to \$467 billion. And this trend is expected to continue throughout the coming years. ■



DRIVING VALUE-ADDED SERVICES

MONETISING CONTENT



1

DIRECT CARRIER BILLING

APIs to facilitate mobile payments for digital goods and services, safely and securely.

2

PSMS

Spontaneous payment solution to monetise interactions that are offline or in an interactive environment such as donations, chat, broadcast response and interactive services.

3

MESSAGING & RICH COMMUNICATIONS

Communicate with consumers, improve and automate processes through effective, direct messaging platforms to improve campaign ROI on marketing activities.

4

VOICE SERVICES

Premium Click-2-Call services or non-premium engagement solutions. Bespoke cross platform solutions that integrate both voice and SMS call to actions to deliver seamless, effective consumer interactions and monetisation.

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THE POWER OF PAYMENT !

Beyond the impulse purchase

Streamlining subscriptions through carrier billing



The adoption of direct carrier billing (DCB) is crucial for brands looking to meet the growing demand for subscription-based content – bypassing card payments to open up subscription services to new audiences and markets, while also giving flexibility to increasingly vigilant consumers. **James Macfarlane**, Group CEO of UK-based mobile payment provider PM Connect explains

Thanks to the ease and speed of adding purchases directly to phone bills, impulse buys will always be a key part of carrier billing's remit – and have been key in introducing direct to bill payment to the mass market.

However, as the subscriptions market matures, customers are beginning to expect both a suite of payment options, and improved standards when it comes to transparency, communication and accountability.

Big brands are beginning to catch on to the vast potential for DCB to help meet customer expectations when it comes to making recurring payments.

MAXIMISING CONSUMER CHOICE

Ultimately, today's consumers expect choice and will drive their purchase behaviour around brands that give them this. Whether this relates to choice of content, phone contracts or payment options, the largest and most successful brands in the world recognise this.

While purchase via debit or credit card will continue to be the favoured payment option of many people, optimising customer journeys means catering to a range of payment preferences, especially when it comes to subscriptions. Some consumers will always choose

the traditional options, but we are seeing a new breed of buyer emerge, those who wish to take advantage of the accessibility, convenience and security benefits of DCB.

Customers may want to add purchases directly to their phone bill either on an ad hoc basis – when they do not have their card on them, or are paying on the go. But DCB is also proving itself as the go-to hassle-free option – eliminating clunky sign-up processes and avoiding the need to give personal details to the supplier.

Offering a payment method that circumvents credit cards becomes even more important in emerging markets, where consumers are more likely to own a phone than to have a bank account. In the African continent, where an estimated 30% of the adult population are unbanked, the DCB option opens up branded content to customers who might not otherwise have had access.

So when big players like Google Play – which has added 20 more carrier billing partnerships over the past year – adopt carrier billing, customer experience is top priority, with the business recognising that an ever-expanding, international user base has a wider variety of needs. For Google, DCB sits alongside e-wallets,

UPI in India and new options to pay for mobile purchases using cash in-store – designed to meet a vast range of customer requirements.

Trailblazer brands see an expanded range of payment options as an extension to the increasing number of platforms for consuming content. Look no further than PM Connect's carrier billing solutions for major sporting brands – offering video highlights and commentary, available through direct-to-bill subscription purchase. These aim to complement each brand's wider content offerings – its websites, apps, and over-the-top (OTT) services. More content options work alongside increasingly diverse ways to pay, catering to the ever-changing ways modern consumers like to receive their entertainment.

COMMUNICATION AND TRANSPARENCY

Alongside wanting more choice, consumers are also wising-up to subscriptions that look to lock them in and are demanding improved communication and opt-out options as a result.

Trusted DCB operators use the ubiquity of SMS - with 90% of texts read within the first three minutes – to their advantage. For example, we send receipts via SMS to subscribers every month, with no fixed-term subscriptions and the option to cancel by texting STOP at any point.

As a result, control of the subscription is handed back to the consumer, incorporating reminders of recurring payments into the day-to-day mobile browsing experience. Strategies like this, alongside working closely with the Phone-

paid Services Authority (PSA), means that carrier billing can offer greater levels of customer control than its card-based counterparts. Contrary to reports in the mainstream media, due to weekly or monthly text updates consumers are actually less likely to sign up to a carrier billing subscription and forget about it than its credit-based counterparts.

Thanks to a combination of ease and accessibility, and a direct and transparent subscriber/provider relationship, DCB is experiencing a boom in popularity as a payment method for subscriptions. PM Connect is seeing an increased number of subscribers through its carrier billing enabled solutions, with these subscribers staying loyal for longer periods of time.

At present, brands have been slow to catch on, with relatively

few offering the DCB option. However, with the most established names leading the way, this is set to change. Brands listening their consumer base and looking to adapt to new markets realise that the subscription sector is moving into the next stage of its growth. Carrier billing is necessary to meet the demands of both international audiences and a newly savvy breed of subscribers. ■

James Macfarlane is Group CEO of UK-based mobile payment provider PM Connect. Find out more about PM Connect at <http://pmconnect.co.uk/>



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Why you should care about Gmail's dynamic content



Google recently announced that it was rolling out a feature that will allow Gmail users to see dynamic content inside emails. Initially limited to Gmail web users, the update could fundamentally change the way organisations communicate with their Gmail customers.

James Hall, Commercial Director, Striata UK explains

Just as imagery via HTML was a great leap forward for email in the 1990s, and the roll-out of responsive coding for mobile took things to the next level in the late 2000s, so dynamic content could define email for the decade to come.

In order to fully grasp why it's such a big deal, it's important to understand exactly what dynamic content is as well the role it could play within the wider email context.

UNDERSTANDING DYNAMIC CONTENT

When it comes to understanding what dynamic content is, it's useful to remind ourselves what conventional email is: a static snapshot of content at the point in time that it was created. Dynamic email, by contrast, allows recipients to view "dynamically updated" content in the same email.

So, for instance, a news organisation could send out an email with a breaking story and, rather than sending multiple emails with new developments, simply

update the original email.

But dynamic content goes further than that. It also allows people to respond to calendar invites within an email, or fill out forms, and reply directly to comments made in Google Docs.

From an organisational perspective, that's one less step recipients have to take in order to complete an action and will likely drive up response rates.

It's also worth noting that, because there's no need to rely on third-party apps or services, dynamic content dramatically reduces any security risks for end users.

WHY IT MATTERS

If you're in charge of your organisation's customer communication strategy, you might be wondering why you should be paying attention to dynamic content if it only applies to Gmail users. After all, isn't the whole point of email its universality?

Given that there are around 4-billion email users worldwide and that email still shows a significantly higher click-through rate

than social media (a campaign is six times more likely to get a click-through from an email than from a tweet, and email is 40 times more effective at acquiring new customers than Facebook or Twitter), does it make sense to focus on a specific client?

Here's the thing though: Gmail has more than 1.5-billion users worldwide and holds a 20% share of the global email client market.

Where Gmail leads, others will follow. It's therefore worth getting on board with dynamic content now, rather than trying to play catchup later.

It's not like you'd be a lab rat for Google either. High-profile organisations such as Pinterest and Booking.com have already implemented dynamic content during the beta stage to make sure that a customer's access to up-to-the-minute information is even more efficient.

GETTING STARTED

If you're interested in implementing dynamic content, how should you go about doing it?

First off, you have to register and be approved before you can send dynamic content. You also have to meet all the guidelines and requirements before you start the registration process.


Dynamic content emails still have to comply with the Gmail bulk sender guidelines. Your email developers can learn how to incorporate this new functionality into your emails from this blog. And, if your company is a GSuite customer, you can enable your users to view dynamic content on all GSuite editions via your admin console.

While, initially, only web users will be able to view an email with dynamic content, support for mobile is coming. This is key, as by Gmail's own reporting, 75% of Gmail users open their email on a mobile device.

EMBRACING CHANGE

As with all world-changing technologies, email has had to adapt and evolve to survive as long as it has.

Dynamic content is, undoubtedly, the next big leap forward in that evolution. Used effectively, it will help email keep up with customer experience expectations.

Smart marketers are already investigating how to add dynamic content to their bucket of email tricks. You should be too. 

James Hall is the Commercial Director for Striata UK. He has more than 20 years experience in a wide range of technology-based roles, the majority of which have involved some form of transition to a digital solution. His expertise extends across the fields of product management, project management, account management and sales.



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The four pillars of engagement

Effective customer engagement in the 'Age of Customer-Centricity' requires a deeper understanding of users' preferences, profiles and requirements in order to capture their interest in relevant products and services and thus to maintain brand loyalty. Here **Adhish Kulkarni**, head of Customer Value Management and Loyalty Business for Evolving Systems outlines how to make it happen in the digital world

Traditional approaches to customer engagement -- batch-based, below-the-line campaigns and static, transactional points-based solutions -- must therefore give way to a set of new, highly engaging, offer and loyalty programs that are built for a generation of demanding, social media-empowered digital natives.

The recognition of this accelerating technology-led change and the rise of the digital consumer has led us at Evolving Systems to identify four key pillars of action, the response to which we believe will define how brands drive customer loyalty in the nascent, always-on, connected world..... and how successful they are at doing that.

These pillars are:

- 1 **Intelligent Customer Engagement** – A focus on customer engagement must now be a priority for any business operating on a digital platform. With particular regard to Loyalty, this is critical in order to keep customers satisfied and to maintain long term, active relationships with the brand. The digital channel allows CSPs to engage with customers in real-time at the 'moment of truth', no matter where they are. Intelligent customer engagement, for example via gamified mechanics, keeps subscribers excited and satisfied.
- 2 **Deeper Insight through Analytics** – The amount of data

available to brands continues to grow at an exponential pace as consumers use digital channels to interact and transact, thereby leaving digital footprints that provide insight into the entire customer journey from initial awareness through to post-purchase satisfaction. For CVM Campaign and Loyalty programs, this data will form the basis for personalization, reward relevance and designing superior customer experiences and it is therefore critical that CSPs are able to access solutions that fully leverage the insights that data holds.

- 3 **More Choice through an Open Partner Ecosystem** –

The walled garden approach of traditional rewards programs is giving way to a more open ecosystem of partners where loyal customers can 'spend' their credits with a host of different partners. The digital channel has opened the opportunity to integrate with physical and digital partners at a global scale. This trend of openness is here to stay and will remain a key element for brands to remain relevant and secure ongoing customer engagement within their loyalty programmes. For CSPs, the technologies required to manage such open relationships with important brand partners is now critical.

- 4 **Catering to Always-On and Omni-Channel** – Customer Value, Retention and Rewards Programs have to adapt to an always-on consumer who is channel agnostic, expecting the brand to engage on email, app, or twitter or SMS in real-time. This is difficult, but it is also an opportunity to engage with customers in a highly relevant and timely manner. Telcos must find ways to provide meaningful cross-channel experiences at the right level of frequency.

INVESTMENT REQUIRED – BUT IN WHAT?

The Four Pillars of Engagement, combined with the nascent digital landscape described at the start of this article, suggests that CSPs urgently need to revitalize or even reinvent their customer engagement tactics and processes. This is because they have to manage their customers' journeys more effectively and in so doing they also have to deliver a far more personalized experience.

It is almost certain that neither of these goals can adequately be

met using legacy technologies. This means, over the coming months, that CSPs will face making vital investment in customer engagement.

This is recognised and it would be inaccurate to suggest that the process of investment has not already started. Applications addressing requirements in areas such as self-care and provisioning in particular have seen increasing attention in recent months. Ovum's survey, referenced earlier, suggests that this year the top three investments that CSPs intend to make are in customer lifecycle management, digital product catalog, and chatbots and virtual agents. These, furthermore, are likely to be significant investments.

However, a piecemeal approach to solving the problems of operating effectively in the new digital landscape is unlikely to be

enough. Joined-up thinking and joined-up operations are needed; a new, lean customer-centricity, where experience is prioritized by both operations and IT systems, has to be the goal.

Data also represents a challenge as it is axiomatic that improving customer-facing processes requires better access to data sources. This is why data management has been a focal point for early CSP digital transformation efforts. Effective customer engagement means bringing together multiple data sources. Good-quality data and improved data storage are the backbone of improved customer engagement and innovative use cases.

Engagement, driven by personalisation, demands the unification and standardization of communications across multiple channels and categories

of customer-related operations. Technology therefore needs to leverage a broad mix of capabilities. New systems will need to integrate with both digital and non-digital customer channels as well as with back-office platforms, such as billing and product catalog, and front-line activities such as sales and marketing. A wide range of functions will need to be better aligned to support the customer experience including cloud infrastructure, unified customer data management, security and compliance mechanisms, interaction intelligence and process automation.

The requirement today is for a new type of Customer Engagement Platform (CEP). This will be a technology that moves away from traditional product-centric and siloed approaches and replaces legacy with a holistic approach to customer engagement.

Ovum's research confirms that CSPs are likely already increasingly investing in these sorts of broad-based customer engagement solutions rather than continuing to rely on the point solutions of the past. ■

Adhish Kulkarni heads the Customer Value Management and Loyalty Business Unit organization for Evolving Systems, an end-to-end digital engagement software and services provider. With 100+ customers across 5 continents, Evolving's solutions empower brands to increase revenue per user, reduce friction, improve retention, and maximize customer satisfaction. The company's goal is to provide operators, brands and advertisers with the tools they need to manage their brand's interaction with consumers over digital channels.



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Love is in the air Dating – the ultimate value added service?

Dating is becoming one of the biggest VAS sectors, but while growth is global, services are very local, very competitive and highly evolved. **Paul Skeldon** takes a look at what the dating market looks like and how to create services that work

Falling in love in 2019 means reaching for a mobile phone and, to use the popular parlance, swiping left or right. Love, it seems is in the air – quite literally, with only the lonely heading to apps and dating sites to find their one true love.

According to a study by Comparethemarket.com back in 2018 – published on Valentine's Day that year, naturally – 76% of people think it is possible or highly likely to find love online and of the many millions who do use dating apps and online dating services, 56% of men and 55% of women have actually found love.

However, online dating finds itself in an interesting predicament. It is at once booming, with more users than ever, and stagnating – with those very same users become more demanding of the experience that they get from their dating apps. Cupid is confused.

Global Dating Insights editor Scott Harvey explains: "Online dating is in a really interesting place as we close out the decade. In terms of adoption and user acquisition, we're seeing fantastic growth across different regions and age cohorts. Most of the stigma around meeting someone online has drained

away, so a high percentage of singles will have a dating service on their phone or laptop if they're looking to meet someone.

"That said, there is a lot of talk about stagnation on the product front at the moment. Many users are dissatisfied with the basic swipe-based interface, while plenty feel jaded because they can't find a real connection. The sector is ripe for disruption because of this, and everyone is asking what the next big innovation will be."

GDI's Harvey again: "We're seeing a lot of new entrants, from the smallest start-ups to social media giants like Facebook, and real opportunity for companies who can crack the marketing and build an engaged community. It's a vertical that's only going to get bigger."

DATING IS CHANGING

The dating market is, however, changing. As we have seen, value added services such as dating are being given a boost by affiliate marketing (see page 1), and dating is one of the big VAS growth areas: but success is hard, not least because it is an ever-evolving market, says Prelinker's CEO, Mauricio Botera.

"It's a growing sector," he

says. "People are growing up with the web from day zero: they are born with an Instagram account. But this makes it an extremely competitive market and a global market. But it is a very level playing field and so everyone copies everyone else. Your product life cycle is very short. You have to offer a great product and a great experience. They experience great products all over the web and mobile and they want the same when dating."

This means dating service providers need to be very agile and keep on moving. "We have to be really creative with the features we use and we have to make it entertaining – dating can be like a second job so it needs to be fun and completing," says Botera. "If you can create an active community with fun features that works then you can differentiate yourself. But it isn't easy and its getting more complex."

"Dating is highly varied," says Carl Borowitz, Marketing Manager, Online Dating Kings. "You have flirt, casual dating and serious dating – so you have to find your place in the market and find what it is you want to offer. We offer anonymity for people that don't want to use their social media profile, especially women who don't want to feel exposed."

Borowitz continues: "There are also all sorts of features that make people subscribe – and

these have to evolve all the time. Competition is fierce and you have to constantly evolve."

For this reason, many dating services are becoming more gamified – but is this something that people want? Comparethemarket.com's research explored people's opinions on how gamification affects the way they approach dating through apps.

It discovered that only 7% of people say they often treat dating apps like a game and use strategies to 'win'.

However, this changes depending on who and where you are; with the 25-34-year-olds, this increases to 11% but among the over 55's it drops to just 2%. Living in Sheffield (13%) or Greater London (9%) means you're more likely to treat app dating as a game, but it's less likely if you live in Scotland (3%), particularly near Edinburgh (1%). Ashley Madison (42%) and Meetic (38%) users are most likely to claim to treat the app as a game.

The question of who treats dating apps like more of a game out of men and women gets slightly different responses depending if you ask men or women. However, they both agree that men are more likely to treat dating apps like a game, with 25% of women and 14% of men agreeing with this statement. Only 8% of men and 6% of women believe women are the most likely to treat online dating as a game.

INTERNATIONAL CHALLENGES

The other reason that dating is such a huge potential market for VAS providers is that it is international – which provides both opportunity and challenges.

“It is definitely an expanding sector in many new markets and technology is seeing markets leapfrogging each other – so markets that were behind are catching up,” says Botega. “Take Brazil, which was lagging. [Brazilian consumers] now all have mobiles and no one has a laptop and so they are now becoming a massive online dating market.”

According to Botega, dating companies have to address each geography separately too – each one is very different so all products have to be localised and different things work in

different markets. This makes it more complex and even more hard to do.

Online Dating Kings Borowitz agrees: “I would say that if someone wants to enter a certain market they have to really understand the local market. I can’t imagine trying to create a services for north eastern Asia, for example, as the culture is so different, which is why we look more at the Germanic markets. But if we do enter a new market we make sure we have someone who is local driving it.”

AI LENDS A HAND

Digital publishers providing personals advertising and dating services can use new artificial intelligence (AI) to increase display ad revenues, minimise data costs and target more relevant consumers for brands, as

well as improving the compatibility of matches for singletons.

“The mass of guys with tigers, photos at music festivals, and profiles which list ‘laughing’, ‘travelling’ and ‘going out and staying in’ as defining characteristics don’t do justice to the incredibly insightful information people share with online dating services,” says Fiona Salmon, UK managing director of 1plusX – an AI data platform that is giving digital publishers new tools to combine the interest data from online dating sites and apps with their main display ad audience data.

“Subscribers share their passions, favourite locations, work, education, appearance, family status, salary bracket as well as their age, gender and more. However, numerous publishers offering dating services are ne-

glecting to make maximum use of this data to match singletons with more relevant people and ads,” she continues. “As 1plusX is extremely user friendly, it’s easy to combine dating data with other data sets to be managed from a single user dashboard. Campaign managers can then use the system to creatively define very focused, high quality audience segments with tightly defined interests. As well as providing a better service to singletons, such focused audiences are highly sought after by brand advertisers, meaning publishers can garner more revenue per ad impression. The 1plusX tools can even help dedicated dating sites to monetise their data through licensing deals and partnerships with other publishers.”



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Welcome

Driving engagement and payment with value added services – online, mobile, in TV, voice devices and who knows where else – is front and centre of World Telemedia and 2019 finds the show more essential than ever before. It's surely the only event in Europe to bring together alternative billing, messaging, social media and affiliate marketing, media, content and brands, making it the ideal place for anyone involved in content, VAS and premium App sales and distribution. You should also attend if you're involved with push messaging, OTT messaging and SMS, billing and payments, content creation or publishing. Because this show closes the virtuous circle of services that can make digital content sticky, 'buy-able' and offers the payment solutions to complete transactions within a few clicks. With the world becoming ever-more mobile-centric – and with mobile payments growing in tandem with mobile media and content consumption – Marbella brings together the key players across this



dynamic value chain – ready to turn your services and content ideas into thriving multi-national propositions that reach consumers wherever they roam. So what are the key things we'll be looking at on October 14th to 16th in the late summer sunshine?

Understanding the industry

First up we unveil some facts and figures on the state of the telemedia industry; having undertaken the most comprehensive Telemedia research project ever. Nick Lane, Mobile Insight Analyst, MobileSquared, a leading telecoms market analyst, has once again been delving deep into the market to see what was happening across the world of carrier billing and value added services. Lane will present the key findings on the size and scope of the global Telemedia market and how it has changed in the past 12 months. He will reveal what percentage of m-commerce uses DCB and how that's likely to develop in the future; growth potential for DCB [after PSD2] and the



MONDAY 14TH OCTOBER

- 10:00 **Registration Opens**
- 15:00 **Meet Market Opens**
- 15:00 **Piano Bar Opens**
Sponsored by kwak Telecom

Spotlight Sessions

- 15:30 **Global PRS/VAS Research – 2019**
- 16:30 **Advertising & Engagement Tools**
- 17:30 **Mobile Billing & Subscriptions**
- 17:45 **Global VAS Research – The Results**

Networking

- 18:00 **Sun Terrace Drinks Party**
- 21:30 **Gold Sponsors Party**
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NB. Schedule subject to change - Please refer to website for the full latest conference details

Three jam packed days with all the right people focussed on driving growth within our sector. This show generates a positive impact within our industry every year.
Joanna Cox, General Manger, Association for Interactive Media & Micropayments (AIMM)

This year was more productive than ever with so many new faces and great contacts. The evening events were truly unforgettable! Looking forward to next year!
Oksana Belkovska, Business Development Manager, ECO Networks SIA

The intimate environment and format bring together buyers and vendors in a relaxed atmosphere which encourages information sharing.
David Wainwright, Founder, TheRedBox

A boutique must attend event. Everyone brings a wealth of knowledge & expertise with a mindset to focus on closing a deal. Less tyre kickers - more deal closers!
David Wainwright, CEO, Hollywood TV

A great event with fantastic people and good business - mixed with fun! I'll be sure to attend next year!
Matt Dadd, UK Vendor Manager, Trusted Knight

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TUESDAY 15TH OCTOBER

09:00 Expo Lounge Opens

Spotlight Sessions

10:00 From SMS To RCS Messaging
11:00 VAS Focus – A Dating “Special”
12:00 5G – Impact On Buying Behaviour
12:45 Complementing DCB With E-Money
14:30 Global Content Opportunities For DCB
15:30 Mobile VAS & DCB In The Media
16:30 MENA Focus – Challenges & Changes
17:30 “Block Clicks & Sleep Better”

Country Updates

09:30 Tunisia & Algeria
10:30 Egypt
11:30 Poland
12:30 Cameroon & Ivory Coast
14:00 Norway
15:00 Senegal & DRC
16:00 South Africa

Networking

13:00 Delegate Buffet Lunch & Drinks
Sponsored by MessageCloud
13:00 Information Exchange Lunches
Sponsored by MessageCloud
15:00 Piano Bar Opens
Sponsored by kwak Telecom
17:00 Expo Bar Happy Hour
19:30 Client Dinners
19:30 Women in Telemedia Private Dinner
Sponsored by DIMOCO
21:30 Platinum Sponsors Party
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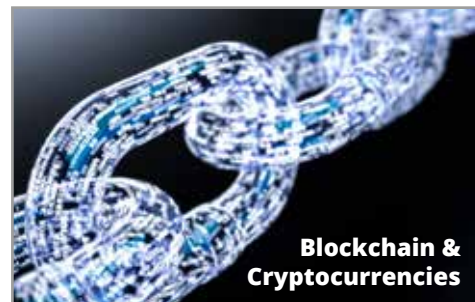
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expansion of the unbanked in emerging markets. The results are strictly under wraps right now, but attendees will enjoy access to top line research, as well as the opportunity to interpret data from the full report – on site, with the analysts.

mVAS – drives it all

If there is a theme to this year's World Telemedia it has to be the rise of mobile value added services (mVAS) and how they pull together the strands of customer acquisition, affiliate marketing, content, services and carrier billing. What constitutes “VAS” is also shifting.



While dating is still a key part of the VAS landscape for telemedia players, it has changed dramatically. The world of dating is driven by apps and some big names. It is also starting to incorporate social media players. For the telemedia sector, this is both threat and an opportunity. The [dating] market is thriving, but it is fiercely competitive. Here we will show you how to play to win – not least how to use intelligent mobile billing to increase revenues of online dating sites, with Ross Williams, CEO, Venntro Media Group, Simon Corbett, Founder, GlobalDatingInsights and Andy Wullmer



COUNTRY UPDATES

Each update is hosted by incumbent specialists that represent billing gateways, aggregators, service providers and network operators and includes:

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- Latest News
- Top Services
- Major Content Providers
- Billing & Subscription Options
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- Compliance Overview
- Marketing & Ad Flow (examples)

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from TrafficPartners.com. Outside of dating, we're also profiling one of the most interesting verticals - mobile games. Here we're offering delegates a unique opportunity to preview Reality Clash - one of the most innovative AR games in the market. Delegates can test it, play it, shoot their competitors and then take part in a workshop - hosted by the co-founder Tony Pearce. The aim of the session will be to brainstorm with industry experts from around the world to learn from their experiences and to advise on how the application of telemedia technologies can be applied to drive marketing and sales, acquire mass market consumers and ultimately stimulate incremental revenues through mobile billing solutions. There's also very real opportunity for participants to pitch their commercial credentials with a view to walking away with an exclusive partnership contract with Reality Clash.

The VAS market is evolving in new directions and offering new opportunities, thanks to the myriad of ways consumers now search for entertainment. This year we take a detailed look at a range of new VAS market environments, including the entertainment viewing habits of the iGeneration; where broadcast and telecoms meet transactional digital media and, of course, OTT content snacking and DCB. Look out for the return of Mark Challinor, the CEO of Mediafutures plus Elson Sutanto from Juniper Research, Joanna Cox (Former) Head of Client Services, Channel 5 and Julia Dimambro,

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Founder & CEO, Seriously Fresh Media - who reveal what your future customers look like and explain how to engage and monetise them.

Carrier billing

Of course, one of the key pillars of any telemedia research and World Telemedia show, is the resurgence of direct carrier billing (DCB). As we have seen, VAS is growing in importance and, with PSD2 and a more liberated attitude towards carrier billing - we see more people paying for services using their phones. This is part of a wider trend, with the growing interest in OTT services, such as sports clips, media content, videos, games and highlights, all looking at new ways of being monetised. While many content providers and consumers want subscriptions, there's growing interest in pushing "one off" access to video clips and other "snacking" content. Here DCB services will see mega-growth globally, with many OTT content suppliers looking to capture occasional users and generate incremental revenues, but then upsell to create a longer term subscriber. Similarly, the FAANG brands - Facebook, Amazon, Apple, Netflix and Google are all looking at carrier billing, particularly in emerging markets. On the other side of the coin, the conference also looks at what MNOs want from DCB vendors to make this a sustainable partnership. A new keynote session features the results of ROCCO research's Direct Carrier

WEDNESDAY 16TH OCTOBER

10:00 Expo Lounge Opens

Spotlight Sessions

10:00 What Do MNOs Want From Vendors?
11:00 Fraud In The DCB Market
12:00 Mobile Games - Monetise & Distribute
13:00 Solutions To Monetise Traffic
14:30 WT19 - Wrap Up Panel

Country Updates

10.30 Malaysia & Thailand
11.30 Belgium & Switzerland
12.30 Turkey
13.30 UK

Networking

14:00 Delegate Buffet Lunch & Drinks
Sponsored by MessageCloud
14:00 Information Exchange Lunches
Sponsored by MessageCloud
15:30 Piano Bar Opens
Sponsored by Kwak Telecom
16:00 Expo Bar Happy Hour
16:30 Expo Close

A fantastic event filled with relevant people all focused on improving the value chain for VAS. A great mix of insights, discussions, meetings and fun. Already looking forward to next year.

Caroline Press, Product Manager
(Payment Services), Three

We had a really good conference; WT Marbella is a good place for us to meet potential customers and existing partners. We'll see you next year!

Frode Alvad, Head of Product & Business Development, Strex

Good fun and good business - what's not to like? Looking forward to attending next year"

Emilie Clauss, International Business Development Manager, Digital Virgo

We were blown away by everything! This was the overall best event we have ever been part of from both a business and fun perspective.

Lars Tillman, Head of Business Development, Famobi

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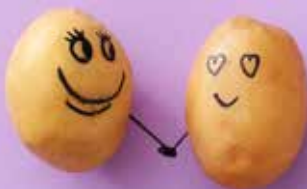


Billing Vendor Performance Report 2019 and ROCCO will also be presenting an award for the "Number 1 DCB Vendor 2019". This session will also bring in representatives from Three to cover this vital aspect of the DCB paradigm.

Marketing, messaging and engagement

Around VAS and billing lie all those other telemedia staples that drive engagement in the first place. As ever, affiliate marketing will play a central role in many of the talks at the show, outlining how it can be used to drive traffic, as well as how the content and services produced by the telemedia value chain can be used by publishers and affiliate networks. The show is also going to be awash with messaging and engagement technologies – from SMS to RCS – all of which can drive engagement and increase sales. Adding carrier billing to messaging is also big – as telemedia tech becomes an essential part of wider ecommerce strategies. Don't miss Nick Millward, VP Europe, mGage talking about how RCS and messaging are colliding with DCB to produce new ways to engage consumers and to monetise your content. While much of the attention is focussed on RCS and its future potential, don't write off SMS yet. It still has a massive hold over the market and, thanks to new technology such as voice devices and other applications

**Horoscopes, Psychic,
Dating & Print Media**



that need messaging, SMS has a bright future in A2P, particularly when offering alternative payment solutions for unbanked markets.

Best of the rest

Aside from these key themes, World Telemedia tackles many other areas including the ever popular Country Update program hosted by Empello, fraud prevention and platform security with Opticks and one of our newest sponsors – EVINA. Both host sessions to help safeguard platforms and protect traffic from fraud. There will also be a new session focusing on VAS challenges and changes in MENA, hosted by Khalis Khalis from OK&C SAL Offshore – who invites all content owner to consider being part of a potential revival in this exciting region. There will also be session on the impact 5G will have on purchasing behaviour which logically sits alongside a presentation on how e-money can complement DCB; both curated by our partner association AIMM. And, if all that wasn't enough, the show will wrap up with beers and a live chat-come podcast recording with show organiser Jarvis Todd and Telemedia magazine editor, Paul Skeldon, who attempt to digest and summaries what's been covered during the 14+hours of Spotlight Sessions.

See you there! 🍷



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THE BIG GUY Paul Skeldon
paul@telemedia-news.com

ART DIRECTOR Victoria Wren
victoria@wr3n.com

CONTRIBUTORS & CONSULTANTS
Victor T Miller, Rory Maguire, Nick Lane, John Strand, Sofia Alves, Bruce Pharoah, Paul Dunone, Jarvis Todd, Sheldon Johns, Mark Birkett, Eric Feltin, Tim Green

SALES & MARKETING
info@Telemedia-news.com

PRODUCTION DIRECTOR Annika Micheli
annika@Telemedia-news.com

PUBLISHER Jarvis Todd
jarvis@Telemedia-news.com

TO SUBSCRIBE www.TelemediaOnline.co.uk

CIRCULATION ENQUIRIES Geraldine Lawton
- O'Sullivan
Geraldine@Telemedia-news.com

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FROM THE EDITOR

World Telemedia: at the nexus of DCB, VAS & engagement

With World Telemedia Marbella 2019 just weeks away – and Brexit just a few weeks after that – it is good to see that the telemedia industry is in rude health.

Changing viewing and content consumption habits – especially on mobile – is changing radically the businesses that are turning to telemedia players to create what consumers want. The rise of OTT services and the increase in snacking by the iGeneration is making what telemedia does suddenly the mainstream collection of technologies and services that can deliver at scale.

The nexus of direct carrier billing (DCB), value-added services (VAS) and engagement technologies, including SMS, RCS, push and affiliate marketing, is proving to be a sweet spot. With content and VAS services out

there looking to make an immediate and immediately monetizable impression – often with a view to leading to the upsell of a subscription or more – the combination of services that are to be found in the pages of this magazine and in the exhibition and conference rooms at World Telemedia are just what everyone from Netflix to Google to William Hill are looking for.

Affiliate marketing, while written off in some quarters, is still a potent part of how VAS services such as gaming, dating, chat, adult and tarot work. Adding in DCB and these services suddenly become readily monetizable.

Similarly, mainstream entertainment services, including Netflix, Google, Facebook and more, are also looking at quick ways to engage and sate users with an

itch to scratch and again, these telemedia services offer the perfect way to do it.

Likewise, expanding the Western paradigm out to other new markets is also helping drive the uptake of carrier billing and VAS as a whole new cohort of consumers – who have grown up with a mobile and have never had a PC or laptop – want to get on board.

Taken together, all this adds up to an industry that is in the right place at the right time – and World Telemedia Marbella is the place to meet all its main players. See you there. 📱

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Paul Skeldon, editor





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Sport and media content: driving VAS markets and carrier billing

The value added services market is shifting to tap into the growing demand for one-off access to sports and media content – and it is driving both carrier billing and VAS services. **Paul Skeldon reports**

The nexus between sports and telecoms has arrived. The two have long had a close relationship, but finally they are as one. The rise of OTT sports content and the need to monetise clips and content has seen the two eyeing each other with growing interest. Now that interest has turned into a full-blown love affair.

According to research by Juniper Research, paying for sports content is going to be a big contributor to global consumer spending on digital content reaching \$250 billion this year. Much of this will be made as impulse purchases on mobile devices as consumers chase not necessarily the whole match or game, but the best bits and highlights.

And this is something that telecoms – and telemedia – is ideally positioned to deliver.

According to James Macfarlane, Group CEO of UK-based mobile payment provider PM

Connect (see page 6), the confluence of impulse purchasing and content access makes carrier billing the ideal tool and telecoms the ideal medium for

delivery.

We live in a world of streaming and subscriptions – but not everyone wants an on-going subscription to certain services;

there is still a huge untapped need for occasional access to some content.

Think about it, the big matches – the Champions League final, the Wimbledon Final, the highlights of a great goal or even a semi-final – these things attract many more viewers than subscriber numbers suggest and these people don't want to subscribe. But if you can tap them into paying a small amount for a temporary subscription or just access to one off bit of content, then content rights owners suddenly have another new revenue stream.

"When it comes to watching popular, mainstream sports on traditional pay TV, customers need to have a package to view the live fixture or to pay an additional fee on top if it's not included in their subscription choice," says Chris Wood, CTO, Spicy Mango. "For example, to watch the NFL on Sky, viewers need the sports package, but they might also need to pay for bolt ons for other sports. This doesn't benefit the customer as they miss out on watching the fixture or end up getting frustrated by paying again."

VAS all about it: media taps into carrier billing

Media companies are also tapping into the growing user hunger for snacking rather than subscribing. While, like sports content, getting a subscription remains the ultimate aim, offering more flexible ways to get into accessing media – particularly on mobile – is becoming vital.

One company looking at driving subscriptions to media content in a new way is Australian publisher CDS Global. It is working with proximity and NFC specialist Thyngs to create all manner of collateral for its magazines that can lead to a mobile subscription.

Subscription leaflets, inserts and packaging can be upgraded with printed QR codes and near-field communication (NFC) tags, so consumers can sign and pay for subscriptions with their smartphone.

By using their mobile to scan a QR code or tap an NFC tag on the page, consumers can quickly and easily set-up and pay for a magazine subscription using Thyngs contactless payment tech-

nology. Order information is then transferred to CDS Global for processing.

Thyngs' NFC technology, which is affordable and efficient to install, can turn any physical item into an interactive experience to boost consumer engagement. So potential future uses include NFC-enabled adverts for brands, digital competition entries and multimedia stickers, which can be retained by the consumer for future use.

Hearst-owned CDS Global, and its clients, will also be able to get valuable insights about consumer behaviour through Thyngs' analytics platform. Using anonymised data, they can learn more about who is signing up to their magazines and their preferences.

Neil Garner, CEO of Thyngs, said: "We're delighted to announce our partnership with CDS Global in the UK and Australia. Our team is very excited to have the opportunity to work with so many well-known and established brands and publishers."

Wood continues: "The reason online is scoring so high in the sports OTT stakes is that it has got the commercial model right. It's easy to access, it's pay per fixture so customers aren't tied into expensive subscriptions, and the infrastructure has become increasingly reliable so customers can still stream that Champion's League final on their mobile whilst they are on holiday."

CARRIER BILLING

In this day and age of multi-million and even billion dollar rights deals, every little helps.

And this is where carrier billing and telecoms services come into their own. This is part of the reason why it is now commonplace to see telcos getting more involved in sport. Telstra, for instance, played a key role in delivering the International Relay Championships for Japan,

utilising its network. It won't be long before this is a standard delivery channel – and one that is monetizable.

"The World Relay Championships is a unique event, and being able to provide athletics fans with two days of full, uninterrupted coverage produced in Sydney was very exciting," he says. "After a successful Telstra DPN trial from the NEP Andrews Hub Sydney to Los Angeles last year, we were looking for an opportunity to use the Telstra DPN and the NEP Andrews Hub to produce an international sports event.

"ITN's broadcast of the World Relay Championships was the perfect two day event to debut the Telstra DPN outside of Australia at cable distances of 16,000 kilometres return trip," says Eriksson.

Bevan Gibson, CTO at ITN, adds: "Our goal is to provide

innovative broadcast solutions for the Rights Holding Broadcasters worldwide. The solution delivered on this occasion, with our partners Telstra and NEP, for the World Relays in Yokohama was nothing short of world-class. We knew that pushing the boundaries of what could be done would be a challenge, but working together, this solution demonstrated the art-of-the-possible."

Eriksson adds: "The successful remote production of the ITN broadcast at the NEP Andrews Hub in Sydney opens a world of future international possibilities. It demonstrates that even across huge distances there is now a viable alternative to production facilities onsite at a venue. We're excited to work with broadcasters and sporting bodies on future events utilising the Telstra DPN."

5G WILL DRIVE VAS

The arrival of 5G is only going to accelerate this process. With 5G uptake by consumers much more rapid than predicted, telecoms company Ericsson is forecasting that the 5G world of super-fast, high def content is nearer to being a reality sooner than anyone expected.

Western Europe leads the way in 5G and it too leads the way in OTT services, especially for sports. Soon we shall see 5G being the way to deliver content and with it the creation of a multi-tiered approach to monetising that content: from big old subs to one off micro-payments for a short clip.

The move to 5G is, of course, going to not only drive the move to OTT sports using telecoms, but a host of other content services that will similarly need to tap into telecoms and telemedia to survive. ■





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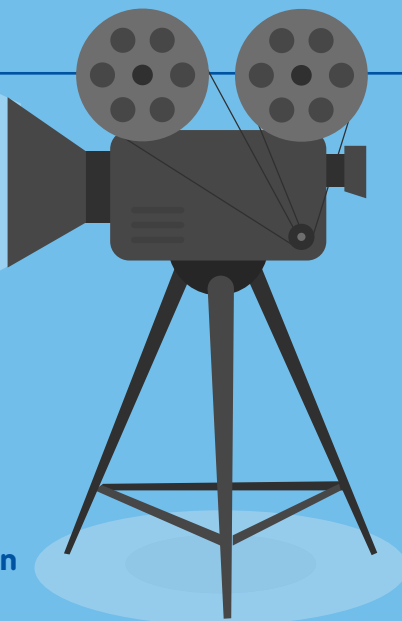
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Video: the star of the VAS show

Video may have killed the radio star, but it is also reshaping how digital advertising around VAS works. Here **Paul Skeldon** takes a look at how video is now the primary content format for most consumers and what that means for monetisation



It's well-known that live TV viewership is declining, but a new study by The National Research Group and Snapchat has discovered that more video is being consumed than ever before, as the smartphone democratises content creation and plays an increasingly important role in consumers' media diets.

According to the study, people are still watching video, but it's being consumed in different ways – today, 29 million consumers watch videos on their smartphones, increasing four times since 2011, when only 7 million watched mobile video.

Meanwhile, young people, in particular, watch more mobile video content than ever before – of every hour online, 33% is dedicated to watching video. More than two thirds of Gen Z and Millennials have increased the amount of mobile video watched over the past year.

Consumption of premium short-form content is becoming increasingly important for young people, with nearly two-thirds of Gen Zs and Millennials watch premium mobile short-form content (videos 10 minutes or less) at least weekly, and about 40% watch daily.

According to a 2018 report from the UK Broadcasters' Audience Research Board (BARB), traditional linear TV viewing among UK citizens of all ages is

on the decline. The decrease is sharpest among Gen Z and Millennials, who spend 34% less time with traditional TV than they did in 2012, and approximately 15% less time since last year.

However, looking at viewership holistically, including streaming and time-shifted TV, it is clear that content consumption is actually growing. BARB predicts that by 2022, the UK will reach new heights in terms of viewing minutes per day—but that viewing will be diffused across an ever-growing selection of devices to fit viewers' situations and desires.

Consumers attribute their boost in mobile video viewing to advances in technology, more choices in video content, and more overall time spent on the internet. It comes as no surprise that over two-thirds of Gen Z and Millennials say they have increased the amount of mobile video they watch over the past year.

Additionally, consumption of premium short-form content is becoming an increasingly important part of young people's media routines. Nearly two-thirds of Gen Zs and Millennials watch premium mobile short-form content (videos 10 minutes or less) at least weekly, and about 40% watch daily. As broadcast TV viewership falls precipitously for these groups, mobile short-form viewing is predicted to rise.

On average, 2 in 5 Snapchatters watch Discover feed content every day. As a mobile video destination, Snapchat continues to prove itself successful as a platform offering short-form content to today's Gen Z and Millennial audience.

MAXIMISING AD POTENTIAL

With video now such a dominant content type that appears on so many channels – TV, mobile social and more – the need to maximise its advertising potential has never been more important.

Now, thanks to data, campaigns can be run across YouTube, Facebook, Instagram and Connected TV.

One example is video ad software and insights company Pixability, which has launched PixabilityONE, a first-of-its-kind software platform powered by data science, used for running campaigns across all these premier video advertising destinations.

The PixabilityONE platform can be used by brands and agencies as a self-service solution to run their own campaigns, and is also used for all campaigns that Pixability manages for major brands such as Puma, Ford, KIND, L'Oréal and Bose.

Analyst firm eMarketer and others are estimating that YouTube, Facebook, Instagram and Connected TV will represent over 75% of the ad market for video

next year. Yet brands and agencies often have siloed teams to manage, measure and report on campaigns run on each platform. PixabilityONE provides a unified view of campaigns across these premier channels for a more holistic, efficient approach to video advertising.

"With PixabilityONE, we can, for the first time, run in-house campaigns across major video ad channels through one platform. At the same time, the platform also delivers campaign performance that's well above what we see when we run campaigns individually on native platforms," says Mark Williams VP of Distribution from Fullscreen, a social content company and a strategic partner of Pixability.

Audience Builder provides a single interface for establishing targeting parameters across premier platforms like YouTube and Facebook. It includes pre-bid campaign brand-safety/suitability filtering; vertical level benchmarks to help with planning; AI-built stock audiences to launch campaigns faster; the ability to save and share audiences across teams; and a creative library to host video ads.

The Campaign Optimisation Engine (COE) uses data science to auto-optimize over 37,000 times a day across all campaigns. Whereas most video ad campaigns are still manually run by humans and may only be able to execute dozens of optimisations in a day, Pixability automatically optimises hundreds of times per day per campaign. It's also the only campaign engine that optimises to multiple KPIs.

"Using PixabilityOne to execute – and ultimately optimise – our cross-platform video ad campaigns enables us to connect with consumers at every stage in their journey with our brand, ultimately leading us to achieve the greatest impact," says Hermann Hassenstein, Head Of Marketing Planning, Global Marketing at Puma. 

Defusing the UK 'adult block' time bomb

Age verification (AV) was due to be introduced on UK adult sites this Summer, but was postponed. However, it will come into force and it is a ticking time privacy time bomb fear some. **Paul Skeldon** takes a look at why it is so problematic and what can be done to defuse it.

New pornography age restrictions were due to come into effect in the UK on 15 July that would require sites and publishers to log user details to verify age. The legislation's implementation has been postponed, but it will come into effect at some point in 2019 and it is going to cause massive problems – and not just for the adult industry.

Under the terms of the legislation, any website showing any sort of 18+ content needs to carry out ID checks on consumers. The ID checks are designed to stop under-18s from visiting pornographic websites and will mean all commercial providers of online pornography – or any other adult content – will have to carry out “robust” checks on their users to ensure they are adults.

And this presents some big issues. Firstly, this data will need to be collected and stored – which is a potentially huge problem, according to privacy watchdog Open Rights Group. With some 20 million adults in the UK thought to be user of online pornography, any data breach would be enormous and highly damaging.

Its research concludes that the data protection in place to protect consumers data being stored is “vague, imprecise and largely a ‘tick box’ exercise”.

Ahead of the age-verification measures being introduced on the initial 15 July deadline, a YouGov poll showed that 76%

of the British public is unaware of the ID checks being introduced.

“With one month until rollout, the UK porn block is a privacy timebomb,” the report says. “Due to the sensitive nature of age verification data, there needs to be a higher standard of protection than the baseline which is offered by data protection legislation,” claims Open Rights Group executive director Jim Killock. “The BBFC’s standard is supposed to deliver this. However, it is a voluntary standard, which offers little information about the level of data protection being offered and provides no means of redress if companies fail to live up to it.”

Killock says that the standard was therefore “pointless and misleading”.

The second issue is that after all the effort being put in, it could become pointless since there are relatively simple ways to get around it.

The UK government claims the new measures are necessary in order to prevent children and young adults from accessing adult content online.

“This is a world-leading step forward to protect our children from adult content which is currently far too easy to access online,” a spokesperson for the Department for Digital, Culture, Media and Sport (DCMS) said earlier this year.

Yet many have noted that the

new rules are unlikely to prevent tech-savvy children from reaching restricted websites. When the date for the identity checks was announced in April there was a surge in interest in technology that would allow people to bypass them.

Online searches for virtual private networks (VPNs) tripled in the hours following the government’s announcement that ID checks would be enforced from July.

DOES TECH HOLD THE KEY?

Mobile phone age verification specialists VeriMe, have become the first tech company in the world to receive a new PAS certification for the industry, just weeks before the UK’s ‘Porn Block’ comes into force.

As part of the Digital Economy Act, age verification for websites containing adult content will become mandatory in the UK from July 15. And while the regulator – the BBFC – have issued a voluntary code for providers, VeriMe says the new PAS1296 certification goes further and ensures information submitted by consumers cannot be retained by third parties such as website owners or affiliate marketing companies.

Director Rudd Apsey, says: “We have worked tirelessly for the last three years to ensure that our age verification technology is the most robust and secure solution available. The PAS1296 certification augments the voluntary standards outlined by the BBFC, which don’t address how third-party websites handle consumer data.”

The PAS1296 was developed between the British Standards Institution and independent regulator the Age Check Certification Scheme (ACCS). It stands for Public Accessible Specification and is designed to define good practice standards for a product, service or process.

Tony Allen, Chief Executive Officer at ACCS, says: “Through our combination of robust processes, custom built technology and a team of fully qualified trading standards and audit professionals, we were able to certify that VeriMe’s technology provides a robust solution for age verification. The fact that VeriMe is the first company anywhere in the world to achieve the PAS certification demonstrates its commitment to age verification and ensuring that under 18s will not have access to age restricted content.

“With mobile becoming an ever-popular platform for accessing age restricted services and products, it’s vital for tech companies to ensure that verification processes in place are as robust as possible in order to protect young users from harm. As such ACCS is proud to be issuing certification of VeriMe under PAS1296:2018 which ensures that the company’s age verification systems actually work in practice.”

VeriMe have been delivering age verification for three years across video on demand platforms, most recently to 13,000 viewers who wished to access adult content via a web portal for the Channel 4 documentary – Mum’s Make Porn. 🍑

Facebook embraces crypto

What does it mean for telemedia?

Facebook has announced plans to roll out its own cryptocurrency, Libra, in 2020. While its impact could reach far and wide into banking, finance and even government, **Paul Skeldon** takes a look at what it might mean for telemedia

Earlier this Summer, Facebook announced that, come 2020, it will be launching its own digital currency – Libra – and an accompanying wallet, Calibra, that will allow the unbanked, the financially excluded and everyone using Facebook, Messenger and WhatsApp to spend, send and receive digital money.

The new digital currency is powered by Blockchain and will be run independently of any nation or central bank – making it a bona fide cryptocurrency and possibly the cryptocurrency that becomes mainstream.

The currency has been developed by Facebook but is also being supported by a number of mainstream companies, each of which have put \$10million into the project. Among the various companies signed up to invest around \$10 million each in Libra are credit card giants Visa and Mastercard, digital payments company PayPal and ridesharing powerhouses Uber and Lyft, as well as eBay, Farfetch and Vodafone.

The money raised by members of the consortium will help to fund the launch of the coin. According to the report, Facebook has sought to raise as much as \$1 billion in support of the new cryptocurrency project.

Together these companies will form the Libra Association, based in Geneva. The Libra Association will be totally independent of all its members and of Facebook, government and central banks and will be overseen by its founding members, who

meet at least two of a range of criteria around net worth, reach and industry leadership. Once the currency is launched – and spendable – Facebook will have the same rights and obligations as any other founding member of the association. The aim is to have about 100 members by the time the currency launches in the first half of 2020.

WHAT IS IT FOR?

The service is being touted as a way to democratise online commerce and digital payments, allowing the unbanked to get a foot on the ladder. According to a Facebook press release for the launch: “For many people around the world, even basic financial services are still out of reach: almost half of the adults in the world don’t have an active bank account and those numbers are worse in developing countries and even worse for women. The cost of that exclusion is high — approximately 70% of small businesses in developing countries lack access to credit and \$25 billion is lost by migrants every year through remittance fees.”

While this is true and a valid driver for the development of the currency, its real value to Facebook lies in making it easier for its customers to buy things direct from adverts run on the social site.

This makes the adverts more engaging and potentially much more lucrative to the advertisers and is a way of Facebook driving more revenue from

adverts. Opening that – and the wider world of ecommerce – to the unbanked and financially excluded globally is secondary, but potentially where the real money lies.

WHAT IT IS REALLY FOR

According to George McDonough, CEO and Co-Founder of KR1, writing in The Fintech Times: Let’s cut to the chase, Facebook (and Libra’s supporting corporations which include Ebay, Visa, Uber and PayPal) are doing this for one reason and that’s data. It will be spun as banking the unbanked, revolutionising payments and connecting the world, but don’t be fooled, this move into the murky world of cryptocurrency is about tapping new wells of data, the modern day oil. No doubt there’ll be plenty of assertions over privacy protection and ‘decentralised’ hand waving, but this is all about Facebook enriching their reservoirs of data, knowing who you are (for real), what you’re buying, who you’re paying and how much you have.”

He continues: “Want a loan? Ask Zuckerberg, want a credit card? Ask Zuckerberg and everything will be at the click of a button on a platform that literally 30% of the planet’s population are using. Further, Libra could crush merchant fees and potentially solve major issues with card fraud. If that wasn’t enough, if Libra is successful in seeing widespread adoption, watch a slew of new coins come to market from the other Silicon Valley heavyweights. Money is the next frontier for the candy crushing, social networking leviathans and I for one would

not want to be standing in their way.”

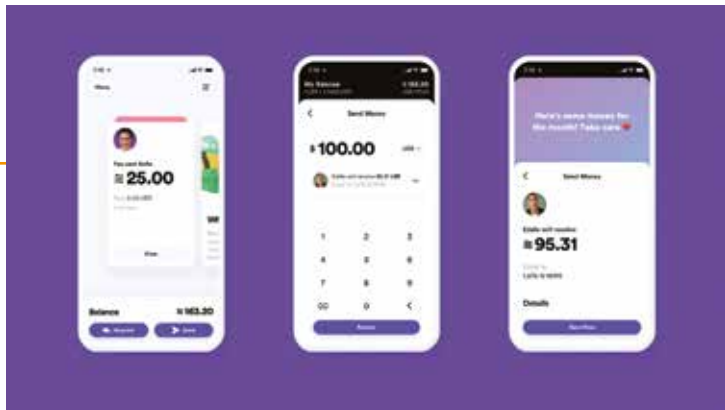
HOW DOES IT WORK?

Libra and the Calibra wallet are underpinned by a ‘limited blockchain’, which, rather than being controlled by all and any networked computer, is run only by selected machines on the network – in this case those of the member companies. This provides the blockchain security needed to underpin the currency, but allows Facebook et al to remain in more control of what is going on – in theory.

On a more practical level, Facebook says that it pins access to currency and digital banking on having ownership of a smartphone, rather than a bank account. At first, it says, Calibra will enable users to send Libra to others with smartphones as easily as sending a text message “and at low to no cost”. It adds: “In time we hope to offer additional services for people and businesses, like paying bills with the push of a button, being a cup of coffee with the scan of a code or riding your local public transit without needing to carry cash or a metro pass.”

With the likes of Uber, Lyft, PayPal and eBay on board, however, it also looks like the service is eying up ecommerce too. Where this is to come to pass it could revolutionise how people pay for things online and on their phones – taking that away from banks and financial services companies and putting it in the hands of the social media firms.

Government is surely not going to like this, as it takes control of the financial world away from central banks and governments



and puts it nominally in the hands of the people, but really cedes control to, in this instance, Facebook.

REGULATORY ISSUES

And this is not going to be the only regulatory issues faced by Facebook with the launch. While states will be looking on closely as to how this pans out, there is also the issues that Facebook is already under increasingly tight scrutiny over its mishandling of data.

Opening itself up to more scrutiny and criticism is the only guaranteed outcome of the Libra launch and it could, if things

go poorly, scupper it before it has even been launched.

According to analyst Alice Blair at EngageHub: "As with any new digital offering, Facebook needs to ensure that trust is built with its users. The social media giant is still recovering from data breaches and in restoring overall trust in the brand, so the launch of Libra has to have a 'customer-centric' approach built in from the very start. This will involve robust social listening and analytics, to monitor how many customers are using the currency and how else they want to use and exchange it. This insight can be used to inform market-

ing personas and inform future experience strategies. Finally – this customer centric approach cannot be at the expense of security. Facebook needs to be highly transparent in how user data is stored and managed, to offer the best possible experience for Libra users that does not compromise on privacy.

FREEDOM OF CHOICE?

Just hours after Facebook announced its new Libra cryptocurrency project, European politicians issued stark warnings calling for tighter regulation of the platform. Some of the most vocal opponents are French Finance Minister Bruno Le Maire and Markus Ferber, a German member of the European Parliament.

In response, Fred Roeder, Managing Director at the Consumer Choice Center, said that

"these political threats were harmful to consumer choice, and would ultimately backfire".

"Overseeing regulation on Internet and financial firms is important, but the 'regulate first, innovate later' mentality that came in response to Libra should give every Internet user a reason to be concerned. If every new Internet innovation now needs to be approved by lawmakers, that sets a dangerous precedent for the future of consumer choice online," said Roeder.

Roeder believes that consumers have the right to choose if they want to use cryptocurrencies, or social networks and are aware of the great risks and benefits that go along with that. People want alternatives, especially with new digital tools, which is why there is so much interest from consumers. 📱

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The Three Ms and the telco of the future

Times are changing for telcos. The three Ms – messages, minutes and megabytes – the bread and butter of telco business are all being commoditised. So where do telcos go to make money? Alastair Masson, head of telco media at NTT DATA UK offers some advice

Mobile network operators (MNOs) and Communication Service Providers (CSPs), particularly in mature markets like the US and Europe, are under pressure. Penetration rates are at, or near, saturation, differentiation is a major challenge, and as a result growth is increasingly difficult to achieve.

At the heart of these challenges is the simple fact that, in term, the 'Three Ms' – messages, minutes and megabytes. These are the bread and butter of telcos and have been completely commoditised. The race to the bottom on price has left margins razor thin and this means the Three Ms are reaching the end of life as the dominant revenue streams for MNOs.

As we look to the future, operators will not be defined by their ability to serve up calls and data. With the passing of the era of the Three Ms, telcos need new business models to diversify their offerings and drive new revenues.

That said, MNOs still have a lot of things in their favour – primarily their relationships with millions of customers and the data that comes with those relationships. The question is how to capitalise on those advantages and transition to new business models?

This is by no means a eulogy for the mobile operator. Far from

the Three Ms era MNOs have focused on revenues derived from the endpoint device, enabled by ownership of the underlying network. Operators have explicitly and almost exclusively been communications service providers – selling access to their network for a fee.

However, to innovate and de-

To innovate and develop products and services beyond connectivity and minutes, operators need to start thinking of themselves differently – they need to be digital service providers offering value

it. As we see exponential growth in all aspects of our connected lives, they are a vital platform that will sustain a large ecosystem of value creators. But we need to think seriously about what a 'post-Three Ms' MNO will look like.

THE NEED FOR A SHIFT IN MINDSET

At the heart of the telco of the future is a change in mindset. In

velop products and services beyond connectivity and minutes, operators need to start thinking of themselves differently. For me the logical step for MNOs is to go beyond communications services and reposition as digital service providers – innovating product sets into relevant experience and value offerings.

This is the key transition that will enable more multi-sided business models.

Inherent in this shift is an acceptance that sometimes operators might not 'own' the direct relationship with the customer in the same way they are used to. Instead, networks can increasingly become 'value-added service platforms' that other service operators can exploit.

By adopting this broader mindset there are some clear and logical adjacencies that operators can take advantage of. IoT solutions, 'verticalised' by industry, are perhaps the clearest example of what this might look like.

Take automotive as a case in point. In use cases like in-car telematics or vehicle-to-vehicle comms the owner of this relationship is likely to be the manufacturer for the foreseeable future. However, while the operator will not take centre stage with the customer it opens up an opportunity to take revenue as the wholesaler that supports the end-customer's relationship with the manufacturer. This is a subtle but important shift in the way operators can generate revenue.

More generally, there are also huge opportunities in embracing the fact that operators no longer

work in and own one ecosystem. Instead, operators find themselves involved in a multiplicity of ecosystems – of which the network is only one component. Therefore, partnerships with third party ‘providers of value’ can open up significant new revenue streams.

Embracing and elevating OTT plays is obviously a big part of this – but it may also incorporate propositions like selling through security solutions for both consumers and enterprises. This shift from being providers of connectivity to providing value-added digital services will bring significant benefits to operators.

PRIORITISING CUSTOMERS, NOT TECHNOLOGY

Allied to this partnership approach is a need to seek out new methods for differentiation. In

mature markets operators are essentially competing for the same business, which makes differentiation a significant challenge. It is also confusing for consumers – who will find it difficult to choose/find the best option and remain loyal to a brand.

As such, operators need to focus on providing the best possible customer experience – changing product innovation from being technology led, to being problem, experience or opportunity led.

This brings with it a need to look outside of the comms sector to develop more customer-centric services. As an example, NTT DATA UK has worked closely with at least two operators to develop new rewards businesses built off the back of regulatory changes in the financial services sector – specifically Open Banking and the Second Payment

Services Directive (PSD2). Clearly these regulations are nothing to do with an operator’s traditional business. However, both cases highlight how diversification can improve customer engagement, deepen the relationship and increase loyalty to the brand.

CAPITALISING ON THE FUTURE

These are potentially seismic shifts for MNOs – changes that cannot be enacted overnight. However, the industry needs to move quickly and decisively.

Strategic innovation partnerships can be an important way to accelerate that transition. The right partner can help operators identify the areas of their business where they are truly best-in-class and then build the ecosystems and collaborations that will magnify and catalyse that advantage into new revenue streams.

Telco’s don’t need to know the answer, but rather they need to provide the platform and environment for the various part of the ecosystem to collaborate, connect and create value.

Whichever way it is achieved, the case for adaptation and diversifying business models is clear, not only because of flattening revenues, but also because of customer demand. With real world deployments of 5G ramping up, end users will need help navigating the new era and exploiting the full potential of the technology. Clearly this is an opportunity for telcos – if they can successfully adapt how they work, where they play and how they create value and the resulting non-messages, megabytes and minutes based revenue. ■

Alastair Masson, is head of telco media at NTT DATA UK



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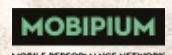
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