

## Data

## Download rankings by operator, Germany, week ending 28-Jan

## Game, Publisher/channel

## E-Plus

- 1 MX Unleashed, THQW
- 2 Olympia Games, Living Mobile
- 3 Klondike Solitaire, Living Mobile
- 4 Ancient Ruins, HandyGames
- 5 Prince of Persia, Gameloft
- 6 DFB Fussball Manager, Living Mobile
- 7 Rayman 3, Gameloft
- 8 Vexx, Acclaim

## O2 Germany

- 1 Ancient Empires, HandyGames
- 2 Prince of Persia: The Sands of Time, Gameloft
- 3 Tetris, iPhone
- 4 Tom Clancy's Rainbow Six 3, Gameloft
- 5 Nightmare Creatures, Gameloft
- 6 MotoGP 2, THQW
- 7 ChessMaster, Gameloft
- 8 Playman Power Games, Mr. Goodliving

## Vodafone D2, Motorola V980

- 1 Solitaire Deluxe, Jamdat
- 2 3D AMF Extreme Bowling, Superscape
- 3 Tetris, iPhone
- 4 Playman Wintergames, Mr Goodliving
- 5 Crash Twinsanity 3D, Wonderphone
- 6 EroSnake, Unknown
- 7 Darts XXX, Future Design Group
- 8 Asphalt Urban GT, Gameloft
- 9 Playboy Strip Poker, Playboy
- 10 MotoGP 2, Gameloft

## Vodafone D2, Nokia 3200

- 1 Monopoly, iPhone
- 2 Tetris, iPhone
- 3 2 Fast 2 Furious, Digital Bridges
- 4 Trivial Pursuit M.E., Mr. Goodliving
- 5 7 Zwerge, Mobile Scope
- 6 Gameloft Solitaire, Gameloft
- 7 Ice Age Skater, Mobile Scope
- 8 Tetris Cascade, iPhone
- 9 Erotic Voyeur, Unknown
- 10 Asphalt Urban GT, Gameloft

Sources: Mobile operators

velopment of such games is usually rushed for release in time for the movie premiere. Mobile operators and content portals are starting to notice the shortfall in revenues – and to act.

O<sub>2</sub> Germany has decided that it will focus primarily on game quality, with a brand being a secondary consideration, says Martens. The cellco will first determine whether a game is of a high enough standard to include in its catalog, based on reviews from mobile games magazines, such as [airgamer.de](http://airgamer.de) or [wgamer.com](http://wgamer.com).

The third consideration for O<sub>2</sub> – after quality and brand – is whether the game can be played on at least two-thirds of the handsets the cellco offers. "This means that even if you have a high-quality title with a big brand, we probably won't launch it if you, for example, support only 40% of our handsets," Martens explains. Such a game will not generate enough revenues to cover O<sub>2</sub>'s costs for testing, launching and marketing the title.

But the cellcos will also offer and promote good-quality, original IP – provided it meets their criteria for handset support. Germany is the only market in Europe – with the possible exception of Spain – in which homegrown content tends to do best, Maglione asserts.

For instance, HandyGames strategy title *Townsmen* performed so well that the German cellcos launched *Townsmen 2* within several days of HandyGames making it available to them, says Kassulke.

Meanwhile, complex strategy games as a whole are popular in Germany – a progression from its PC-gaming heritage – and both Elkwere and HandyGames are known for their strategy titles (*MGA*, 21 Jan, 2005). Sports and erotic titles are also popular among O<sub>2</sub> subscribers, says Martens.

The process of getting a mobile game onto a cellco's deck is a well-structured process in Germany, for both cellcos and games companies.

Assuming the games company has delivered a quality game that has the required handset coverage, Martens says the time between O<sub>2</sub> receiving a game and launching it depends on

the theme and brand of the title. Games based on movies or new console releases are usually published within a week, he says, while others are released on a monthly schedule that provides O<sub>2</sub>'s customers with a good mix of titles.

Meanwhile, Garanin says it can take three months from the time the company first mentions a title to an operator, as part of regular road-map discussions, to the time the game goes live on the cellco's game deck. "You have to accept that there is a preprocess," Garanin says. That process includes testing on the part of both Living Mobile and the cellco, and the cellco's scheduling of the game into its own launch road map.

## Pay-per-download remains the primary pricing model

Also, O<sub>2</sub> constantly refreshes its deck, a process that involves releasing new ports of older, already published games in order to extend their life cycle, as well as rereleasing poorly performing games either at lower prices or bundled with other games. "As a last measure, the weakest games are unpublished," says Martens.

Pay-per-download remains the primary pricing model for most cellcos in Germany, though Vodafone Germany recently introduced a subscription that allows users to purchase three games a month. O<sub>2</sub> also plans to offer subscriptions in the near future, says Martens, while in 2006 it plans to launch i-mode, which will also offer monthly subscriptions to mobile games channels.

Multiplayer and 3D are both nascent markets. O<sub>2</sub> Germany offers one title, Macrospace's *Fatal Force*, which has a Bluetooth multiplayer mode, but Martens says the mobile games market is still too young and the customer base too small for the cellco to invest significantly in multiplayer infrastructure and marketing.

Vodafone and T-Mobile both offer some multiplayer features on certain titles, but do not provide a good

business model for developers or satisfactory pricing models for gamers, says Kassulke. Vodafone gamers, for example, must resubscribe every 30 days to play the cellco's multiplayer games.

It seems, however, that cellcos and games companies are more enthusiastic about 3D games, with almost all of the cellcos offering at least one 3D title (see stats, pp. 7-14). 3D games are also proving popular enough with subscribers who own more-advanced handsets, such as the Motorola V980. Two 3D titles appear in Vodafone Germany's top 10 list for the Motorola device (see fig. 2).

But not all games companies are enamored with 3D. Kassulke says that offering 3D games is more of a marketing exercise for cellcos and handset manufacturers, rather than a proven business model.

Content portals, including Jamba! and PinkerTune, are also playing increasingly important roles in the value chain, particularly since publishers are questioning whether the cellcos can continue to justify the typical 50% revenue share they receive by saying they spend more on marketing than the games companies do.

"Two years ago that was true, but now they are not doing any marketing for games," Andresen says.

Compared with the cellcos, content portal Jamba! has spent about €60 million (US\$78.18 million) on advertising its mobile content in Germany, of which about 10% has gone toward advertising mobile games, Andresen estimates. Even though the games companies will likely get only a 20-25% revenue share on the purchase price, the lower cut is more palatable because Jamba! is investing in marketing.

Meanwhile, Switzerland-based technology provider PinkerTune is advertising Living Mobile games on German TV channel RTL II. PinkerTune has run TV spots for five of Living Mobile's games, including *MegaMan*, which was advertised during RTL II's screening of a Manga series called *MegaMan: NT Warrior*.

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