



IBM Global Business Services





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- Executive Summary
- Industry Perspectives
- Proposed Solution
- Why IBM



We understand the newspaper industry is seeking information from providers who can help enable the monetization of digital assets

Background

- The newspaper industry continues to face declining print revenues and seeks ways to further exploit the growth in digital platforms.
- The industry is evaluating opportunities to further monetize digital assets (text, video, photos, etc.)
 online.
- The revenue model is still under consideration, but could include: tiered pricing strategies, content in exchange for information, transactional, or passport options.

Objectives

- The task force therefore seeks information on product and service options that can be available within the upcoming six to nine months to enable the going forward monetization strategy.
 - 1. What are the available options for providing access to digital content?
 - 2. What are the key requirements for such a platform?
 - 3. What are the technological capabilities of current solution providers and, if applicable, what additional development is required?
 - What is the business model for current solution providers?
 - 5. What insights can providers offer on consumer behavior/preferences regarding payment for services or willingness to provide personal information?



IBM is pleased to respond to this Request For Information, we believe we are in a unique position to enable digital content monetization

Our Proposed Solution

- IBM NICA provides an integrated Digital Workflow solution to manage assets from creation and capture through publishing and distribution to repurposing and syndication.
- NICA supports multiple content types maintaining the links, relationships and rights associated with original assets, across multiple versions and asset usages.
- This solution, coupled with our interactive design group and the world's largest media and entertainment services organization can create a leading platform to manage the monetization of content.

Why IBM

- Our product offerings and services capabilities within the digital media space are unparalleled.
- We bring deep industry knowledge, and an understanding of the challenges the industry faces as it
 moves forward with new business models designed to drive revenues in the digital era.
- We also bring robust thought leadership and primary consumer research in the space. Through surveys
 of over 7,000 consumers we have a good understanding of consumer preferences around digital product
 offerings and desired business models.
- We have relevant experience with many of the world's leading media providers, and the NICA solution is already being used with companies across the globe.
- With the world's largest media consulting practice, we can also offer our services to support you with your needs from: evaluation and recommendations on revenue model, to deeper consumer insights, process and organizational change requirements and additional technology support as needed.

Contact Information

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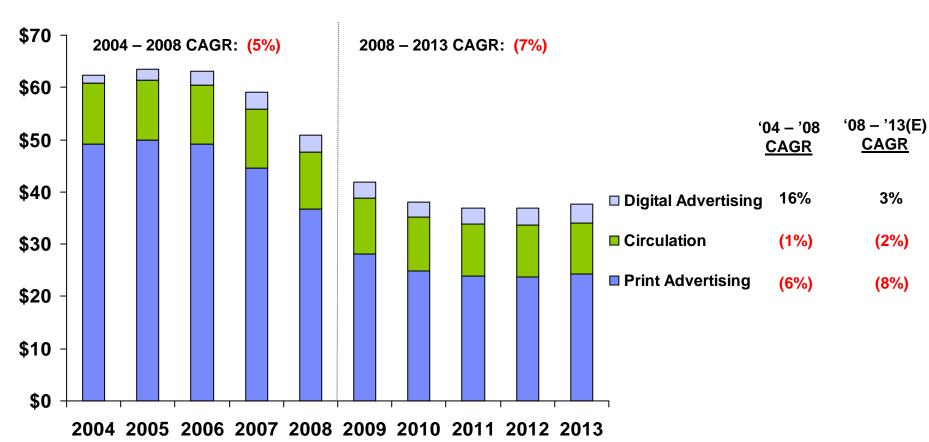
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The newspaper industry has faced substantial challenges, and digital growth has not made up for declines in print revenue

US Newspaper Historical and Forecasted Growth 2004 - 2013



Source: Barclay's Newspaper FactBook, February, 2009, PwC 2009 - 2013 Media Outlook, IBV analysis



However, limited revenue models have been explored online to date, there are a wide array of alternatives for consideration

Revenue Model Alternatives in the Digital Era

As dollars migrate to digital, many industries have experienced overall revenue erosion. Digital dollars have not replaced the losses experienced in traditional businesses. But digital platforms offer the opportunity to explore more flexible revenue models and choices for consumers. Though consumers often prefer ad-supported, a sizeable portion prefer to pay for content to avoid advertising messages, or as a way to access premium features. Who pays, how the product is priced, and what defines a product can all be modified in the digital era.

Payer

Subsidized products (free for consumer)

- Product placement
- Sponsorships
- Ad-supported
- · Social media
- White label

Pricing

Cash flow shifts

- Subscriptions
- Freemium
- Variable or dynamic
- Passport (shared access)
- Rent versus buy
- Cross-subsidy

Product

Product redefined

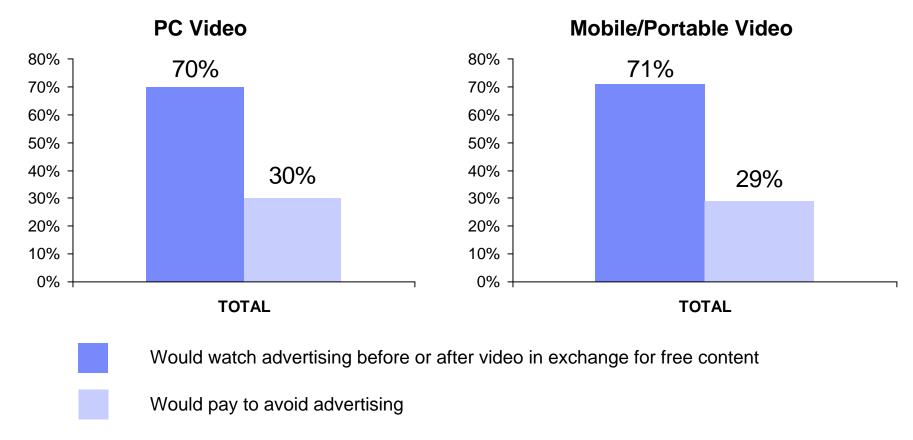
- Service-itization (offering services around the product)
- Componentization
- Diversification
- Mash up

The majority of media companies, including newspapers, have primarily explored ad-supported models. There has been limited exploration of consumer-paid models.



Our research shows though consumers prefer ad-supported models, there is a sizeable segment willing to pay for content

Preferred Business Models – Online and Mobile/Portable Video

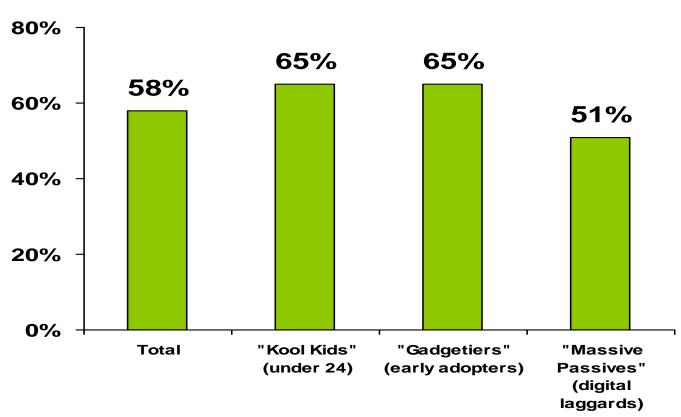


Source: 2008 IBM Digital Consumer Survey. Total responses = 2800 across six countries: Australia, Germany, India, Japan, UK, US



There is also opportunity for improved relevancy and resulting ad premiums, consumers will provide information in exchange for value

Willingness to Provide Information About Yourself in Exchange for Value*



Source: 2008 IBM Digital Consumer Survey. Total responses = 2800 across six countries: Australia, Germany, India, Japan, UK, US *NOTE: Perceived value included: access to digital content (e.g. video, music), loyalty points, free cellular airtime minutes



Contents

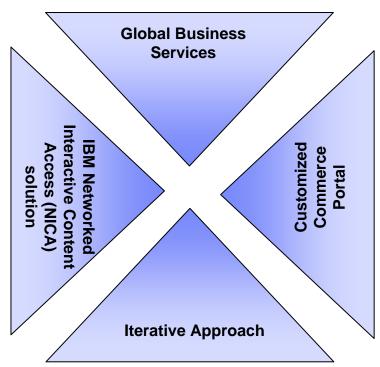
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IBM proposes a solution that combines technology and services with a proven delivery approach

 The combined talent of our IBM Interactive organization combined with our global design, delivery and integration services organization provide the right resource mix to create the most value

 IBM NICA provides an integrated Digital Workflow solution to manage assets from creation and capture through publishing and distribution to repurposing and syndication.



- A commerce portal provides the framework to:
 - Enable the shopping and buying process
 - Setup consumer profiles
 - Authenticate users
 - Delivery a seamless front end experience

 The strategy encompasses a longer first release cycle followed by smaller, more frequent releases to continue to deliver value to the consumer



IBM's Networked Interactive Content Access (NICA) is an enterprise-wide solution that can enable the monetization of digital newspaper content

What is NICA?

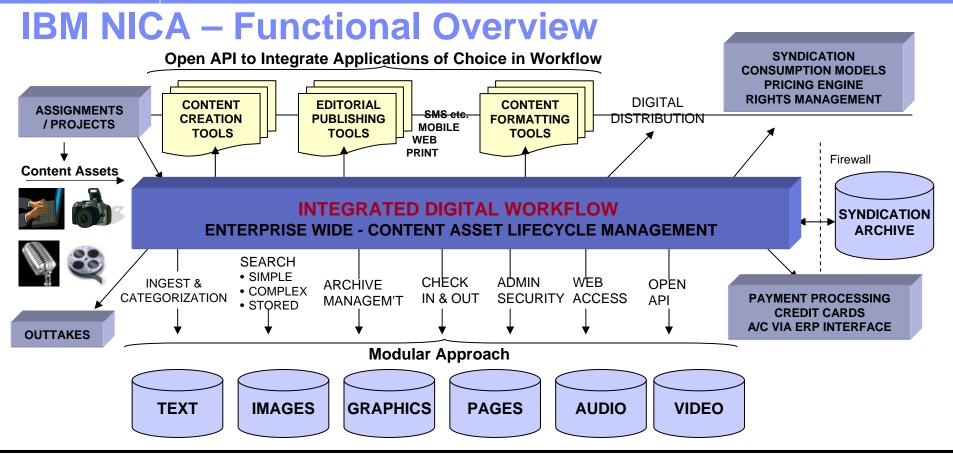
An Enterprise-wide solution for managing the lifecycle of Content Assets

- NICA provides an integrated Digital Workflow solution to manage assets from creation and capture through publishing and distribution to repurposing and syndication.
- NICA supports multiple content types maintaining the links, relationships and rights associated with original assets, across multiple versions and asset usages.
- Via open API's it allows the use of best-of-breed applications within the workflow to create, edit, and publish content, for the format, channel, device, of choice.
- NICA is an IBM developed and supported world-wide solution with applicability to any customer producing and managing digital content.

NICA is Not:

- An Application for Content Creation, Content Editing, Content Publishing
- Middleware
- Purely a Content Management solution for Publishing





Key Capabilities

Create

- Assignments & Outtakes
- Content Ingest
- Categorization Engine
- Rights Capture

Manage

- Enterprise Content Management
- Powerful Search Engine
- Archive Management
- Security

Distribute

- Digital Distribution
- Syndication
- Web Access
- Open API

Transact

- Rights Management
- Consumption Models
- Pricing Engine
- Payment Processing

INTEGRATED DIGITAL WORKFLOW ACROSS LIFECYCLE OF CONTENT ASSET



NICA can meet the bulk of NAA's stated capability requirements

Meets capability

Some development required



Supporting detail for solution capability mapping in appendix

Capability Requirement	Met with IBM NICA Solution?
Accept or retrieve content from participating newspapers/media companies.	
Manage single sign-on that allows consumers to navigate across participating media company Web sites	
Process content in industry standard formats for news (NITF, NewsML2)	
Track proper source of original content	
Manage and protect intellectual property rights of content	
Provide effective and efficient browser based user interface	
Provide appropriate database technology for content management	
Manage a variety of transactional capabilities (e.g. micropayments, subscriptions, etc.) based on a range of criteria (e.g. existing subscriber or member, number of pages viewed or stories accessed previously, etc.)	
Communicate with banks using standard formats (please include capabilities to accept credit card information, process transactions, reconcile payments, etc.)	•
Provide PCI compliant customer information protection	
Provide an information barter environment with appropriate privacy and other protections (i.e. access to content in exchange for more detailed user info	
Provide simple customer registration/logon process	
Tie a customer and their information to a particular newspaper (their home paper)	
Provide references to relevant content from participating newspapers	
Provide design with advertising positions	
Include AdsML based e-commerce	



NICA Business Value Summary

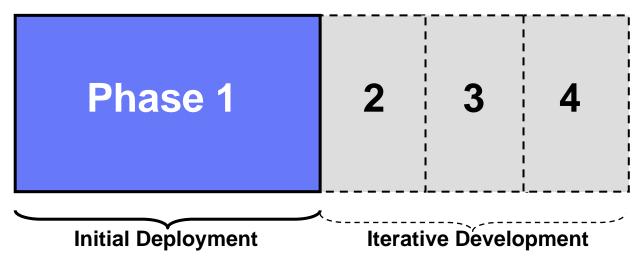
- NICA can bring real value to NAA constituents with all the functionalities typical of a Digital Asset Management System (Ingest, Store, Search, Browse, Retrieve and Reuse contents)
- NICA has excellent capabilities to manage access to content at a very fine-grain level
- The pricing engine allows for building very a flexible and powerful set of rules to dynamically assign prices to content, according to content attributes, user attributes and to the use of purchased content
- Enables companies to create an interactive digital library to consolidate, integrate and manage digital content from different sources
- ROI achieved through lower operational costs through more efficient production processes. ROI is further achieved by the repurposing of content for new products and the sale and syndication of content online
- Integrates and manages complex rights for content reuse
- Provides workflow management and integration with legacy production and editorial systems
- Due to its XML based core NICA is easy to integrate with existing production systems and other enterprise content management systems
- Integrates with cutting edge SOA environments, such as Media Hub, allowing maximum flexibility for other systems to access content





Our typical implementation approach follows a multi phase approach to launch and enhance the solution

There are several strategies that can be utilized when deploying new technology to support a business. There are business and technology implications that should be considered for the initial launch and for the subsequent incremental releases:



- Initial Deployment (Phase 1) The strategy for the initial deployment is considered apart from that of the subsequent phases because it represents the initial go-to-market for the business and includes the development of the core technology elements for IT.
- Iterative Development (Phase N) Each subsequent release after Phase 1 includes incremental business and technology capabilities beyond what was deployed initially. These phases typically come at regular intervals (for example: 2 to 8 per year).

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NICA, coupled with an approach focused on agility and speed to market should lead to a solution within an 8 to 9 month timeframe

There are two fundamental strategies for deployment of technology in support of new business. A decision should be made for initial deployment, as well as a decision for the subsequent release pattern:

Agility and Speed to Market

Phase 1: Introduce a PMT system with the necessary core functions and minimal 'nice-to-have' features in order to get the business and technology running as quickly as possible.

Phase N: Release quickly, focusing on a small number of targeted enhancements or a single larger enhancement.

Benefits	Disadvantages
 Faster to market, reaction to business decisions, get ahead of potential competition 	 Limited functionality can skew public reaction negatively in early phases
 Lower development costs per phase 	Can limit availability of early revenue drivers
 Faster feedback from the consumer community to update strategy or change focus 	

Completeness and Depth of Capability

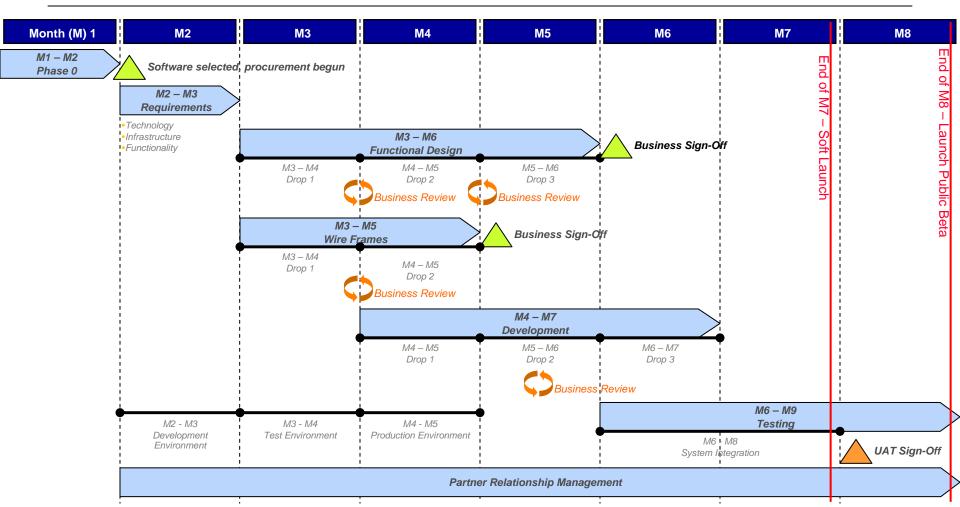
Phase 1: Introduce a more functionally robust PMT system at initial release by taking more time developing Phase 1. Phase N: Bundle functionality to create larger incremental releases, deploying a more robust set of changes.

Benefits	Disadvantages
 Initial release is more complete at go-live, likely improving consumer response More revenue drivers available at initial release Incremental releases can be more streamlined since more functions already exist if this strategy is used during Phase 1 	 Longer time-to-market can change market conditions Higher development costs per phase



ILLUSTRATIVE

For the first phase of the NAA implementation, the timeframe would follow a more traditional waterfall approach*



*NOTE: This is an estimated timeline. A more detailed timeline will require an understanding of a number of underlying assumptions.



The IBM Business model for this type of solution is a combination of product licensing, services and annual maintenance fees

Typical NICA solution engagements include the following pricing components:

- Product licensing
- Design and Implementation / Integration Services
- Annual Maintenance



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IBM has unique Media & Entertainment capabilities to assist clients with a range of services

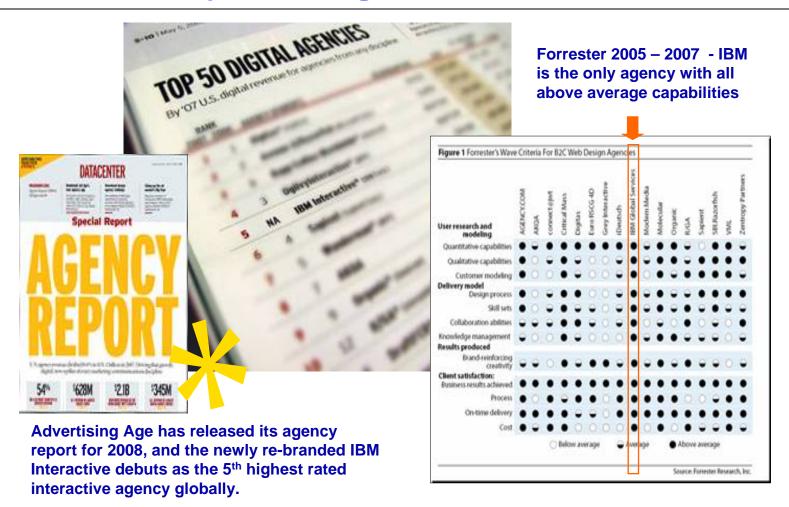


- Media is more than a \$2 billion business for IBM including everything from consulting and systems development to outsourcing and microelectronics
- We have the world's largest Media & Entertainment consulting and services practice with over 3,000 consultants working on projects
- Our consultants, partners and staff have long-term Media & Entertainment industry experience and relationships

- We have a full range of industry-specific solutions integrated with our business partner applications
- We have a wealth of M&E intellectual capital and knowledge
- We leverage IBM Media & Entertainment technology research and participate in industry standard setting bodies



IBM has a leading interactive design services group that can develop a seamless front-end portal through which consumers can interact





IBM NICA Customers Today

North America

- National Geographic Society (USA)
- Hearst Magazines (USA)
 - Cosmopolitan, CosmoGIRL!, Country Living, Esquire, Good Housekeeping, Harper's BAZAAR, House Beautiful, Marie Claire, O The Oprah Magazine, O at Home, Popular Mechanics, Quick & Simple, Redbook, Seventeen, SmartMoney, TEEN, Town & Country, Town & Country TRAVEL, Veranda
- Columbus Dispatch (USA)
- San Antonio Express-News (USA)
- Cedar Rapids Gazette (USA)
- United Nations (USA)

South America

- El Mercurio (Chile)
 - El Mercurio, La Segunda, Ulitmas Noticias
- Grupo RBS (Brazil)
 - •Zero Hora, Diário Gaúc<mark>ho, Pioneiro, Diár</mark>io de Santa Maria<mark>, Diário C</mark>atarinense, Hora de Santa Catarina, Jornal de Santa Catarina, A Notícia

Asia

- Singapore Press Holdings (Singapore)
 - (English) The Straits Times, The Sunday Times, The Business Times, The New Paper, The New Paper on Sunday, Streats, Computer Times.
 - (Chinese) Lianhe Zaobao, Lianhe Wanbao, Shin Min Daily News, Friday Weekly, Thumbs Up, My Paper
- The Hindu (India)

Europe

- News International
 - The Times (UK)
 - The Sunday Times (UK)
 - •News of the World (UK)
 - •The Sun (UK)
 - •The London Paper (UK)
- Manchester Evening News (UK)
- JP Politiken/Hus
 - Ekstra Bladet (Denmark)
 - Jyllands-Posten (Denmark)
 - •Politiken (Denmark)
 - Polfoto (Denmark)
- Jydske Vestkysten (Denmark)
- Fedrelandsvennen (Norway)
- RCS (Italy)
- La Repubblica (Italy)
- El Mundo (Spain)
- Frankfurter Allgemeine (Germany)



IBM has delivered the strategy, process and technology work across a number of different clients and industries

		Strategy	Process	Techn- ology	Org. Change
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	A&P	•	•	•	•
ery	Ahold USA	•	•	•	•
Grocery	Delhaize	•	•	•	
0	Pathmark Stores	•	•	•	
	Publix		•	•	
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Home	Lowe's	•	•	•	

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Apparel	Ann Taylor	•		•	•
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	Gap		•	•	
	CVS	•		•	
Drug	Eckerds		•	•	•
_	Walgreens			•	
9	Staples	•	**************************************	•	***************************************
Office	OfficeMax	•	•	•	
	Office Depot		•	•	•
PVIIII 71111 71111 71111 71111	Tiffany's	•	•	•	1111 / 2111 (71101 V 11101 (11
	LLBean	•	•		
	Family Dollar		•	•	
	Pler 1	•	•		
	RE	•		•	
alty	Barnes & Nobles	•			
Specialty	Blockbuster	•		•	
S	Hallmark	•			
	Bombay Company	•	•	•	
	USPS Retail	•	•	•	
	AutoZone		•	•	
	ToyRUs	•	•	•	
ADDRESS CONTRACTOR CONTRACTOR	McDonalds	•		•	
Food Service	Wendy's		•	•	
Foc	Yum! Brands	•		•	
	Starbucks				



We have also partnered with others on leading edge industry solutions, including MAGHOUND in the US

MAGHOUND is a wholly owned subsidiary of Time Inc. and Time Warner. Combined revenues in 2008 were USD \$46.9 billion

Business Driver

The magazine industry continues to see a decline of reader ship and advertising revenue. MAGHOUND is a membership model that charges consumers a low monthly rate for magazine that and provides the ability to add, change or cancel their membership at any time. This is a fundamental, and innovative shift for a traditional subscription based model

Solution

- The IBM solution involved implementing custom designed user interfaces on top of the Elastic Path BEA Commerce Platform
- Utilized IBM resources from:
 - The IBM Interactive group to develop the wire frames and visual designs
 - GBS Strategy & Transformation to manage the project and analyze the back office processes
 - GBS Application Innovation Services to develop the customer facing website, the commerce back end as well as the integration between MAGHOUND any multiple internal and external partners

Business Benefits

- Speed of Implementation: Took the concept from sketches to public launch in 12 months
- Monthly Revenue Steam: Provided a monthly reoccurring billing platform
- One Source for Publisher Information: Provided integration to MAGHOUND publishers
- Uniform Magazine Fulfillment Platform:
 Provided integration to 4 major fulfillment houses and a framework that capable of quickly expanding to other fulfillment or provisioning systems





Finally, we bring deep industry insights. Each year IBM conducts a major primary research study on disruptive industry trends.





Contact

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Appendix: Capability Requirements Mapping



Capability Requirement	IBM NICA Capabilities
Accept or retrieve content from participating newspapers/media companies.	NICA is able to manage content coming from different sources in a unique repository and manage this content taking in account the rights of the single contributor of these objects. For example our installation at JP/Politikens Hus A/S manages photos that belong to four different Titles and one Photo Agency. Each Title can use for free photos that it owns, and pay a fee for the use of photos owned by other titles. The same photo are sold on the WEB using a Web Site built by the customer using our WEB API and powered by our NICA price engine
Manage single sign-on that allows consumers to navigate across participating media company Web sites	This is something related to the architecture of the final solution for NAA, but it's a topic that is typically managed as a development and integration requirement
Process content in industry standard formats for news (NITF, NewsML2)	NICA has been in the publishing market since the late 1990s and has a very deep knowledge off all the standard formats adopted by the publishing industry. So it's able to manage IPTC, NITF, Adobe XMP, NewsML2 and every other standard based on XML



Capability Requirement	IBM NICA Capabilities
Track proper source of original content	The Ingest phase of any Digital Asset Management solution is crucial for the success of the solution itself. This is even more fundamental with the explosion of the number and the type of assets that a company has to deal with. The NICA ingest module is able to: • Automatically extract all the available metadata from the assets, but also to automatically and efficiently classify assets according to industry standard or customer provided taxonomies.
	Automatically assign information related to the ingest channel/ provider (single Photo Agencies, single Media Company and so on).
	Normalize extracted metadata coming from heterogeneous tagging standards and different sources.
	Provide the ability to identify and maintain links between compound objects and their components.
	Immediately capture Rights related to arriving assets. Automatically detect duplicated assets
Manage and protect intellectual property rights of content	NICA's ingest process is able to automatically capture all property rights associated to different objects, extracting them from metadata contained in the objects themselves or assigning them based on incoming channels (FTP, email, user direct upload). All this information is store in the NICA DB tables and are used to govern all the actions that final users can perform on the content such as search and browse content, view/modify content metadata, view content preview, download/buy content



Capability Requirement	IBM NICA Capabilities
Provide effective and efficient browser based user interface	This is something related to the Portal that will be constructed, according to the specific requirements of the customer. In this scenario NICA acts as the back-end system and it's able to provide all the functionalities that will allow to build an effective and efficient user interface, supporting concept like Galleries, Personal and Shared Collection, Personal Saved Queries, Link among different type of contents
Provide appropriate database technology for content management	NICA is totally based on the two widespread RDBMS on the market DB2 or Oracle. All information related to the objects (metadata, usage rights and so on) are stored on the DBMS tables, together with the information regarding the users, historical records of users activities and information related to system configuration and objects organizations (Archives, Galleries, Collections etc) The database schema of NICA is public, so we don't use proprietary formats to store information, and all content related information can be accessed using standard tools by external applications



Capability Requirement

Manage a variety of transactional capabilities (e.g. micropayments, subscriptions, etc.) based on a range of criteria (e.g. existing subscriber or member, number of pages viewed or stories accessed previously, etc.)

IBM NICA Capabilities

NICA is able to support both B2B and B2C business model. It's greatest value in this environment is provided by NICA's pricing engine. NICA offers the possibility to have a flexible-price policies, in which customers pay different prices for the same type of the objects or all customers with the specified attributes are charged the same price for the objects

For example, it is possible to set a very high price for a new product or the price can change depending by use or distribution of the object.

There are three factors that influence the price of an object to buy:

- the user attributes
- the object attributes (owner, rights, age, quality)
- the transaction attributes (related to the use of the contents, e.g limited or unlimited, placement of the content, country where the content will be used)

The mechanism of final determination of the price consists of two steps:

- 1. Calculation of the base price applying a set of rules of charge/discount based on the attributes of the object and the customer who is buying the object.
- 2. Calculation of the final price applying a set of rules of charge/discount based on the attributes of the transaction, depending on what the object will be used for. This price will be calculated on-line, at the time of the purchase.

When an object has been added to the cart, the object characteristics and the user attributes will determine the base price for the object. Then the choices of the shopper for the transaction will determine the final price for the object. After all objects have been priced, inserting the values into the transaction mask, the final order price will be calculated. Charges/discounts rules can be applied to single objects or the full order (e.g. we can manage discounts based on total final price or on total purchased content).



Capability Requirement	IBM NICA Capabilities
Communicate with banks using standard formats (please include capabilities to accept credit card information, process transactions, reconcile payments, etc.)	Generic Payment Services provides a number of programming interfaces to allow the integration with the merchant system application. these APIs allow to build the appropriate HTTP request and the parsing of the XML responses under the covers. With it's generalized architecture, NICA is not tied with specific Payment Service, but it can support different Payment Gateways (everyone using distributed native API development toolkit). managing them as Plug-ins.
	NICA it's able to manage all the transaction actions by a dedicated request dispatcher. This dispatcher recognizes specific functions related to payment requests and is able to wrap them and forward to the appropriate Payment Gateway Plug-in . NICA supports the one-shot transaction to realize the 'Sale mode' in the checkout processing: syndication needs to expedite the delivery of content to the buyer (when not directly downloaded) and guarantees the capture of funds from the financial institution
	NICA manages the final order status that can be • completed • declined • failed
Provide PCI compliant customer information protection	Development would occur as part of design and build of a front-end portal.



Capability Requirement	IBM NICA Capabilities
Provide an information barter environment with appropriate privacy and other protections (i.e. access to content in exchange for more detailed user info	The standard SSL for secure client-server communication on the Web is used to encrypt the communication between client and server when the user wants to proceed with the check out process and buy the content selected in the cart.
Provide simple customer registration/logon process	NICA is able to manage two different types: a "guest" user, a "qualified" user A "guest" user is a generic Web user who enters the site for looking at the shop and eventually buying something. This user is not registered and his actions are not tracked on the NICA Server. He can access a limited set of actions on NICA (browse on some views, search, see preview and metadata) and if he wants to shop for a digital asset (photo, text, graphics) he has to register himself in the NICA system. A "qualified" user is a user that has been registered in the NICA System. He can be a previous "guest" user, who registered through the Internet (B2C) or a user registered by a NICA System administrator (B2B). He can add preferred digital items to shopping cart and shop for them using the cart functionalities. Again he can see the history of all orders submitted in the past and their status.
	The generic Web user accesses a standard home page and asks the system for a GUEST LOGIN. The application provides the access to the system showing default gallery/collection configured for guest users. Guest users can interact with some of the functionalities (search, browse, preview contents) depending of the permission scenario already defined. To access the cart or more advanced functionalities guest users can REGISTER into the NICA system. The User Profile mask can be completely configurable and all data fields configured in this data mask will be displayed in this form.



Capability Requirement	IBM NICA Capabilities
Tie a customer and their information to a particular newspaper (their home paper)	NICA is able to maintain a different profile for each user or group of homogeneous users. So each users can be addressed to a specific home page according to your preferences, access a specified set of contents and use a specified set of functionalities.
Provide references to relevant content from participating newspapers	This is something related to the Portal that will be constructed, but NICA is able to support this requirements, proving a rich set of functionalities (e.g Parametric Galleries) that can be use to highlight special contents (e.g contents from a specific Provider in the last n-hour, on the last n-days, objects related to a specific topic like SPORTS, POLITICS or ECONOMY, contents related to a specific event like Obama visit in Italy).
Provide design with advertising positions	This capability will be incorporated into the design and development of the Portal
Include AdsML based e- commerce	This capability will be incorporated into the design and development of the Portal NICA is a Digital Asset management system, with some extension related to eCommerce topics, that can be used in order to build a complete eCommerce Solution. Nica provides support for the management of 'subscribed' and 'not subscribed' users,
	cart management, price engine for dynamic price calculation based on objects attributes, buyer attributes, attributes related to the use of purchase objects, transaction record management and digital content delivery management through FTP. eMail, Direct Download, Web Publishing.