



July Systems Overview

Integrated Mobile Marketplace Solutions
for Smart Mobile Retailing

WCA Mobile Retailing Panel
February 21, 2006

- **Provides integrated mobile marketplace solutions**, that enable smart mobile content retailing by mobile operators, MVNOs, cross-operator retailers, content providers, media companies & brands
- **Solutions deployed in US and Europe** with multiple operator & other mobile retailer customers who reach over 220 million consumers worldwide.
- **Headquartered in Silicon Valley**, Global Product Center in Bangalore, India. European offices in Germany & UK.
- **92 member multi-domain global team** – Including 69 in product development, implementation, and operations; and 15 in sales, marketing and business development
- **Funding from leading VC's** – Motorola Ventures, Charles River Ventures, NeoCarta Ventures, WestBridge Capital, Jumpstartup, Acer Technology Ventures, and Silicon Valley Bancshares
- **Strategic relationship with Motorola** – July's IMM system is integrated into Motorola's GAMA (Global Applications Management Architecture) and Motorola is one of July's channel partners



- 115 million global mobile data subscribers as of early 2004¹
- Expected to reach 1.2 billion by 2008 on full-feature handsets²

2008 Mobile
Entertainment
Revenues³



\$8.3 billion



\$18.4 billion



\$21.3 billion

Source:

1. EMC
2. STRATEGY ANALYTICS
3. JUNIPER RESEARCH

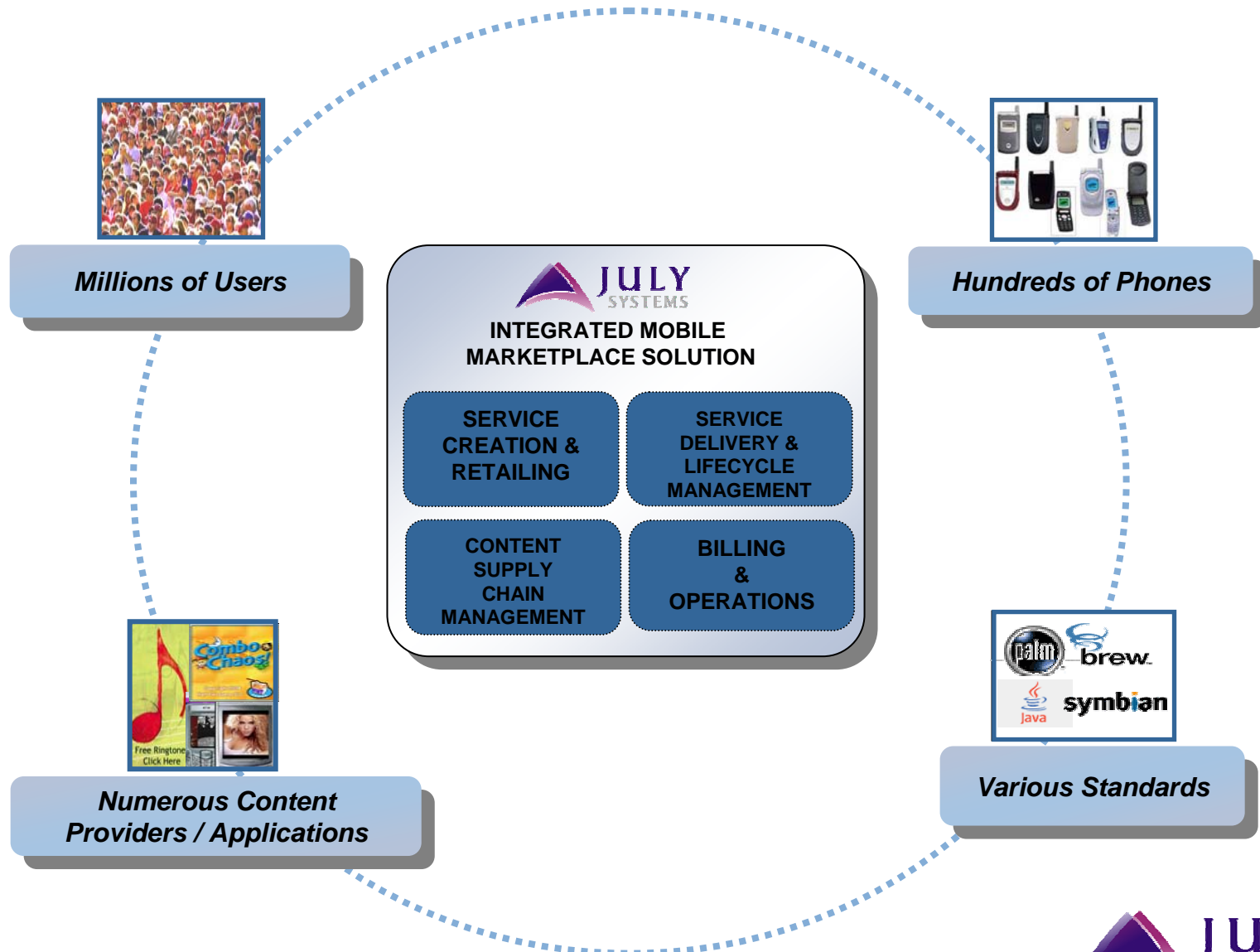


- **\$10.3 billion mobile entertainment revenues in 2004³**
- **Forecast to increase 5x to \$51.1 billion by 2008³**

Market potential & consumers exist.

But can the industry deliver?

Managing Complexity in the Mobile Value Chain



- **Mobile content retail today is an unnatural experience for most mobile users**
- **Retailers not realizing full potential**
 - Long time-to-market cycle
 - Undifferentiated download services
 - Inflexibility in managing live services
 - ‘One-style-fits-all’ approach

Solutions are built around the three pillars of mobile content retail



Merchandising

■ *Merchandising*

- Dynamic content packaging
- Flexible pricing models
- Targeted promotion & campaign management



Personalization

■ *Personalization*

- Intelligent presentation
- Personalized pricing
- User-aware recommendation



Community

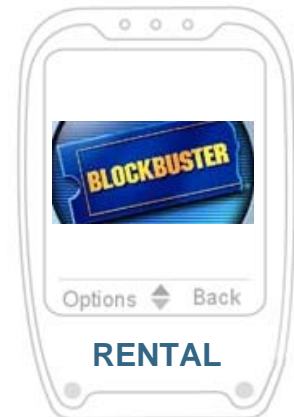
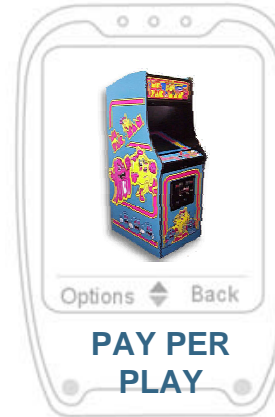
■ *Community*

- Gifting
- Referrals



Merchandising

Flexible Pricing Models



Bundled Cross Content Discovery



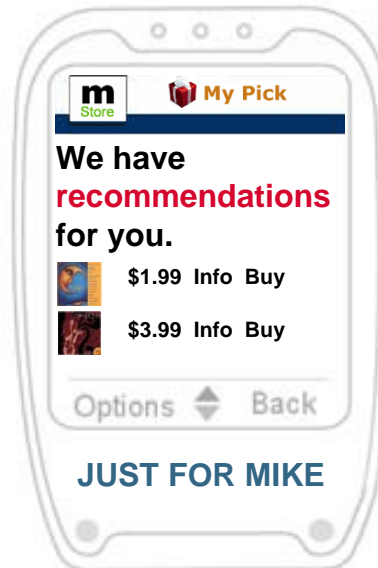
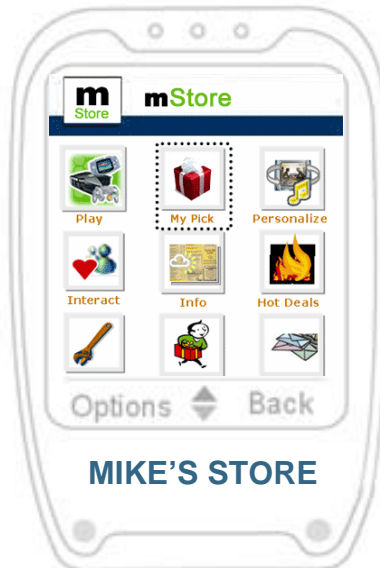
Enable consumers to easily discover and buy mobile services.
Increase revenues by offering differentiated pricing to various consumer segments.

Personalized Discovery, Recommendations & Pricing

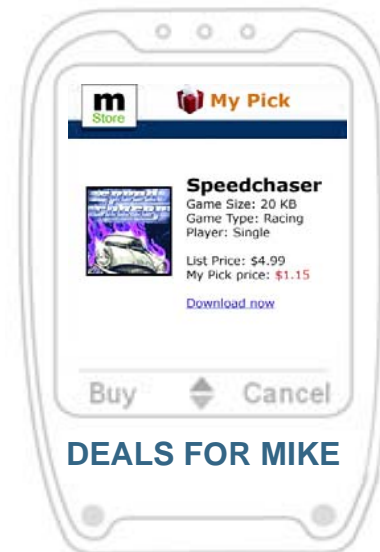
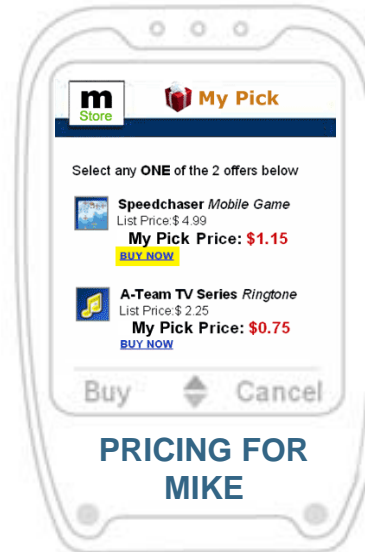


Personalization

User Aware Discovery & Recommendations



Personalized Pricing



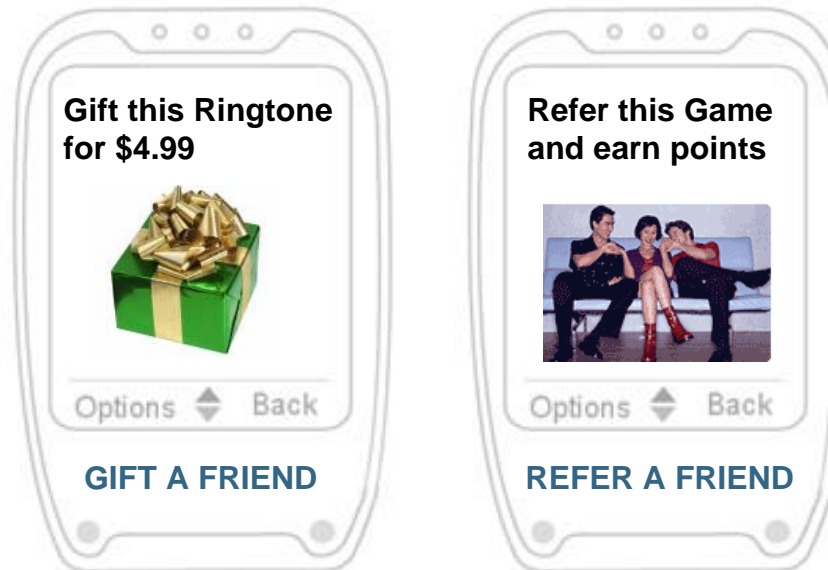
Decrease consumer churn through personalized features.
Drive additional purchase by up-selling consumers to value added packages.

Building Communities & Interactivity



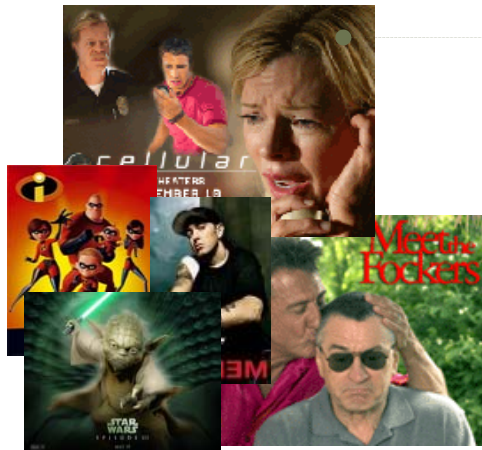
Community

Community Oriented Features



Generate “stickiness” & value by enabling intra-community dialogues – consumers want to share interests, idiosyncrasies, needs and preferences.

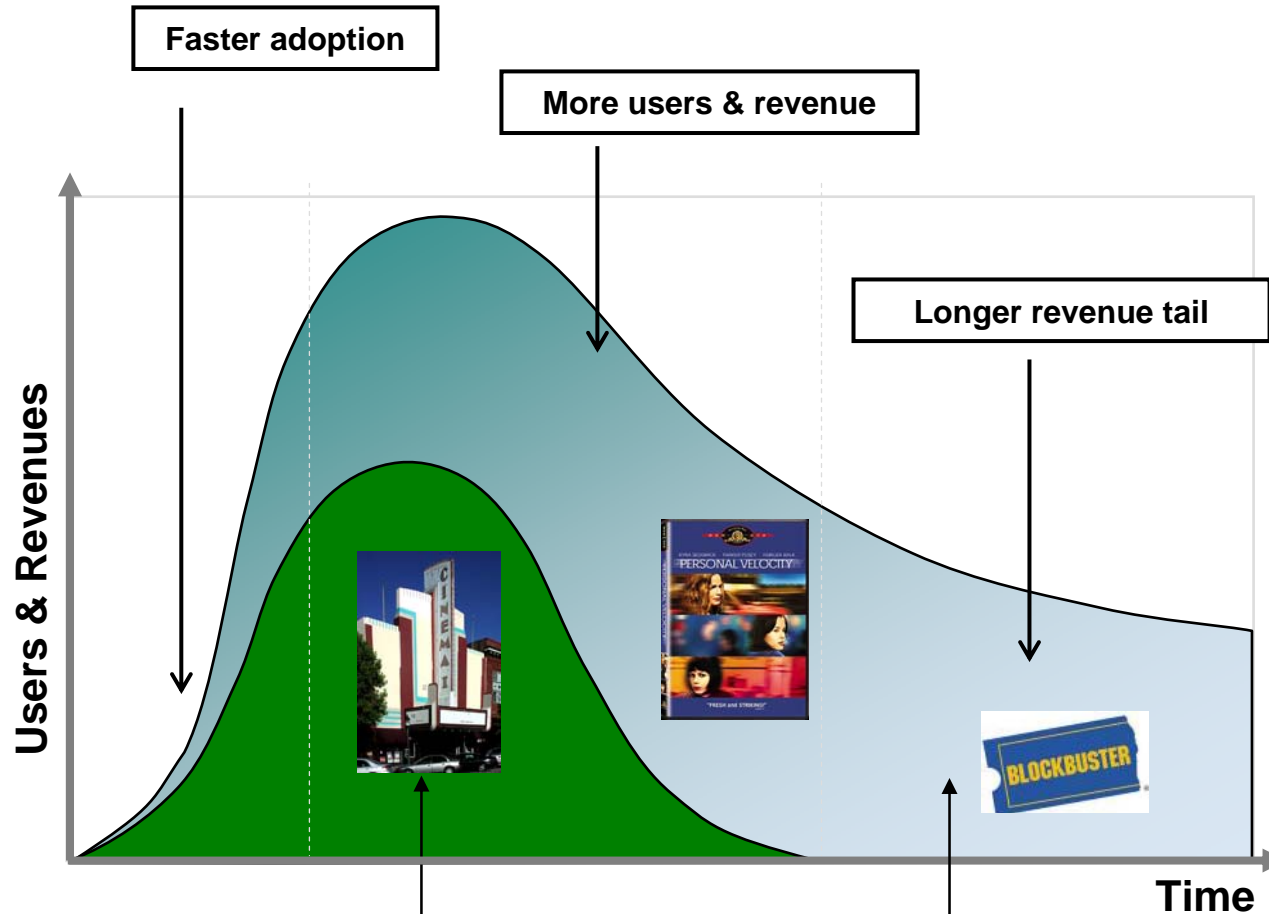
For All Types of Mobile Content



- Games
- Tones
- Music Downloads
- Pictures
- Video Clips
- Streaming
& More!

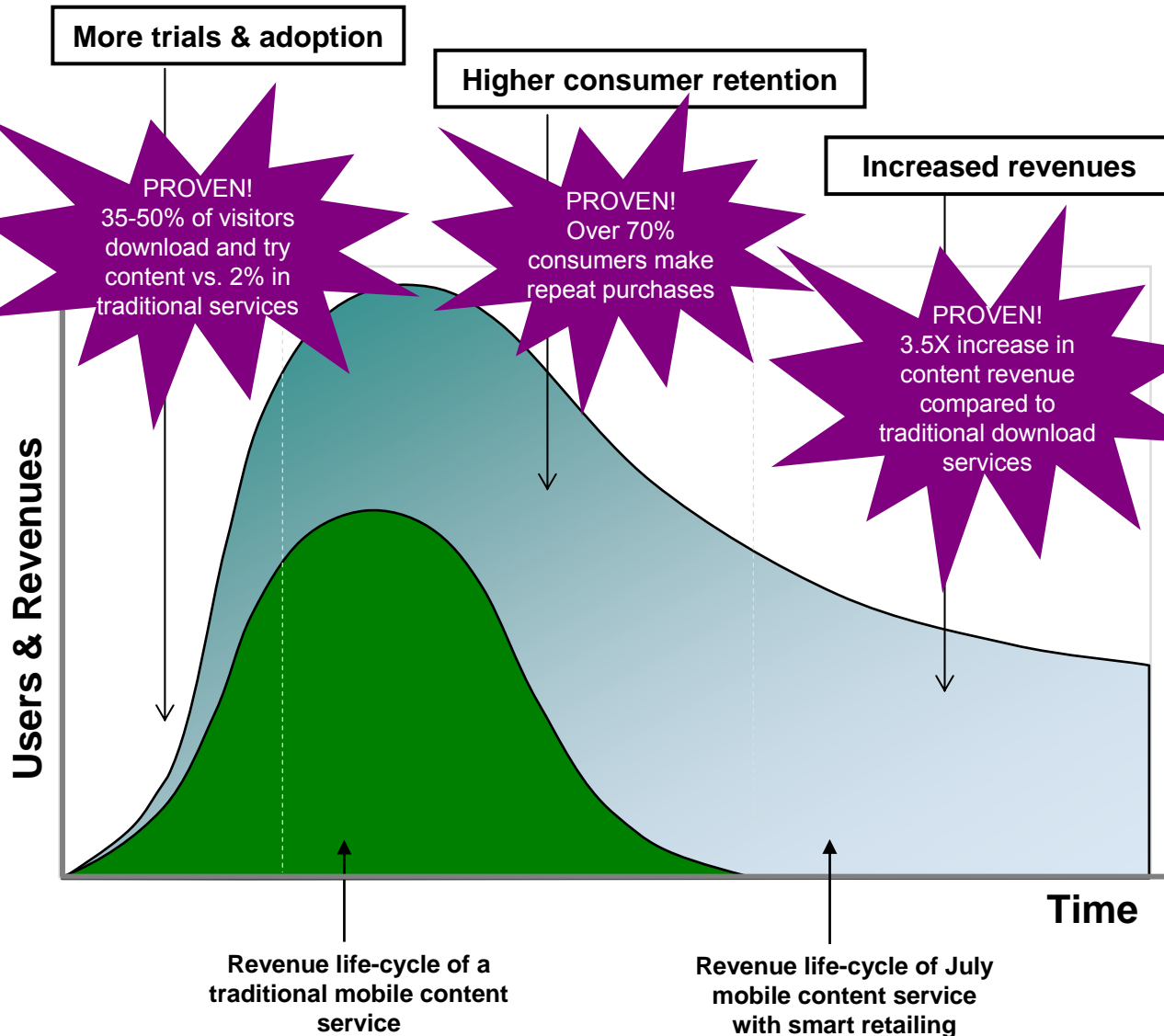
July provides smart retailing solutions across all mobile content types.

Extending the Revenue Life-Cycle of Content



July's smart mobile retailing features significantly increase and extend the revenue life cycle of content

Customer Impact



Quickly and easily launch services –
Fast time-to-market

Smart personalized services to drive **mass market adoption**

Dynamic, collaborative service and content lifecycle management

Dramatic increase in ARPU and revenues

Benefits for the All in the Value Chain

Content Players

- Reach new consumer segments
- Choice on pricing and packaging
- Maximize revenue over life-cycle



Retailers (Operator & Non-Operator)

- Advanced retailing capabilities to build consumer relationships and increase consumer spending
- Dynamically launch and manage services in real-time

Billing & Transport

- Increase traffic/usage & billing revenues



Consumers

- Get a richer user experience with simple, innovative, & personalized services





Thank You

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- **July provides end-to-end integrated mobile marketplace solutions to reach the mass-market:**
 - **Smart Mobile Content Retailing Stores** → managed stores with smart retailing capabilities
 - **Smart Mobile Content Malls** → managed malls consisting of sets of integrated stores
 - **Smart Mobile Marketplace Platform** → infrastructure platform product for creating, deploying, & managing mobile stores and malls.
- **Solutions are built around three pillars of smart retailing:**
 - **Merchandizing** (e.g. try before you buy, flexible pricing, content bundling)
 - **Personalization** (e.g. user-aware content discovery, dynamic user-aware pricing)
 - **Community** (e.g. gifting and referrals)

→ Across all content types



Merchandising



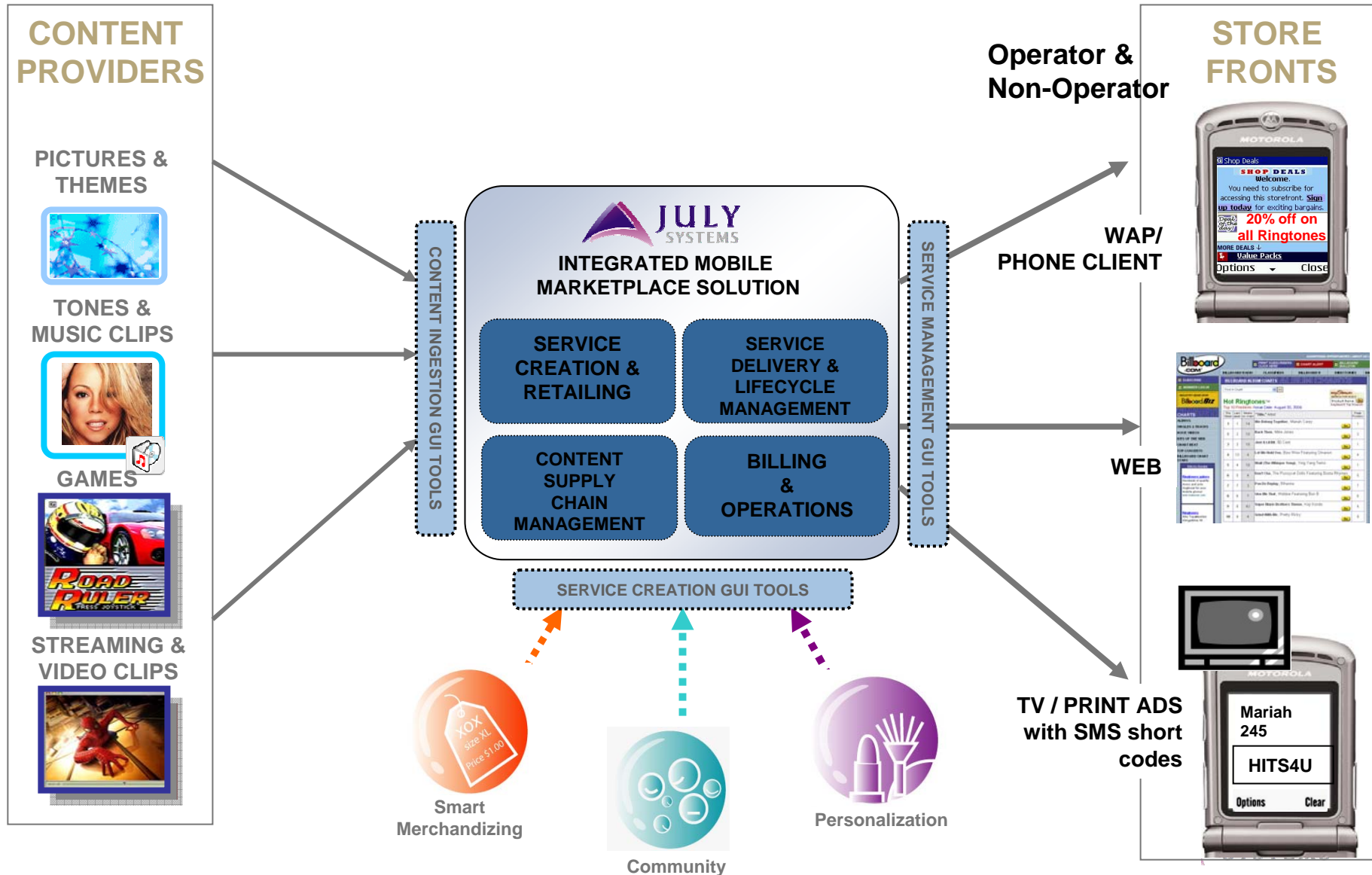
Community



Personalization

To deliver profitable
collaborative marketplace solutions
for
smart, personalized retailing
of mobile content

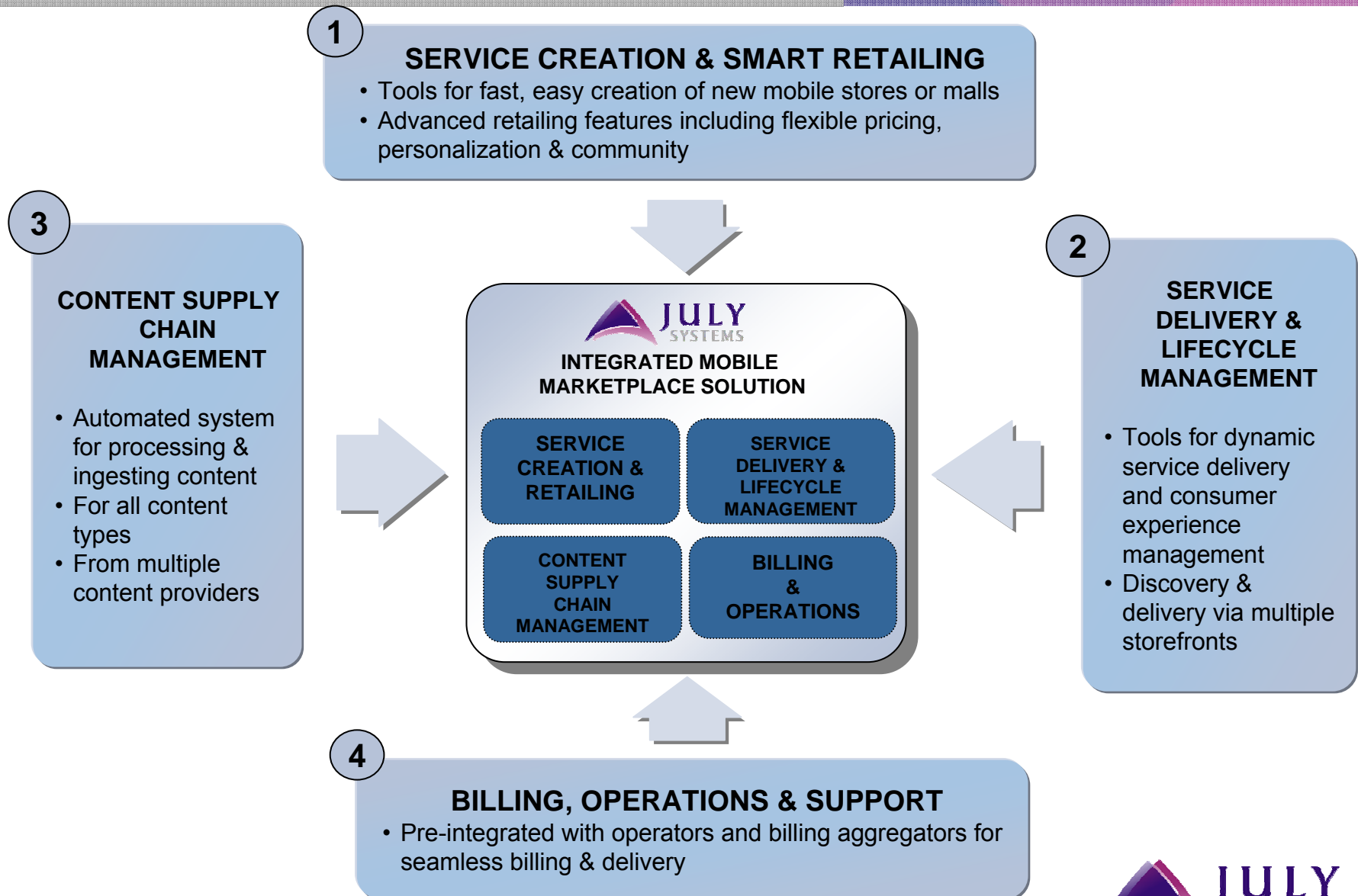
Integrated Mobile Marketplace (IMM)



BACK-UP SLIDES



Integrated Mobile Marketplace Platform (IMM)



Case Study 1

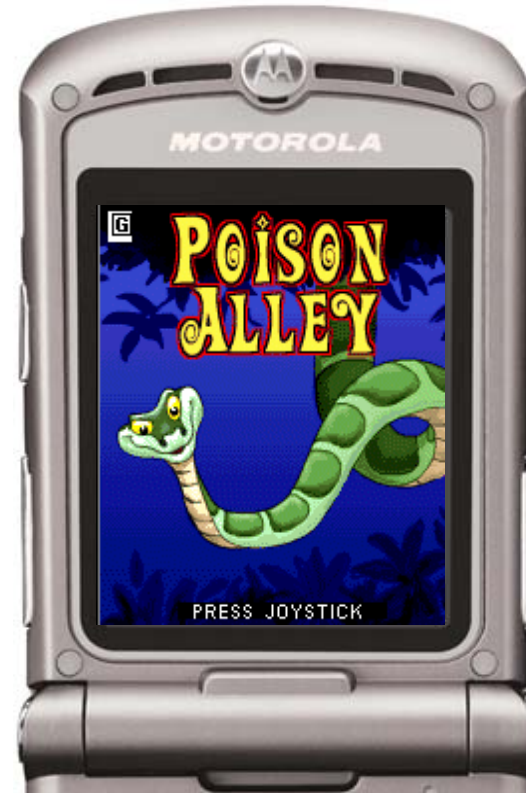
Cingular Free Games Sampler



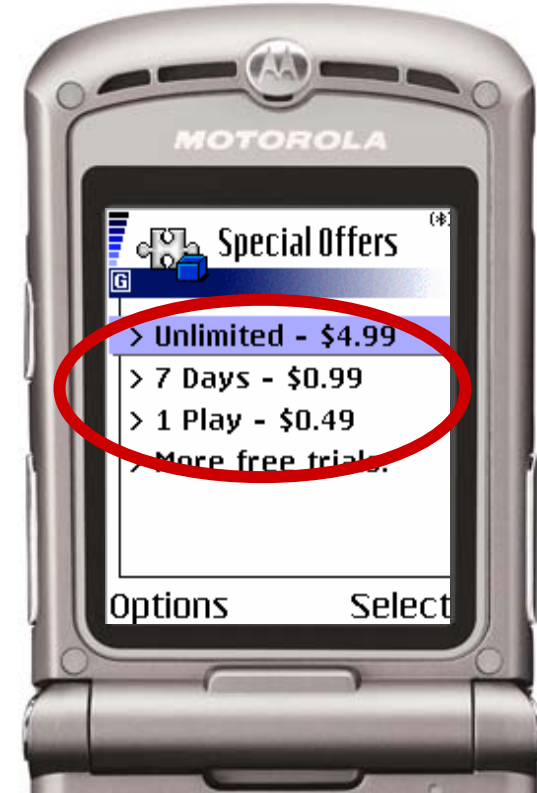
Games Sampler Store: Smart Retailing in Action



Free Trial / Try-Before-Buy Model



Flexible Pricing Offers





Games Sampler Store on Cingular: Impact on Consumers

- **Description – Live service with over 800,000 games downloaded**
 - Smart merchandizing of mobile games (try-before-you-buy, rental pricing, pay-per-use, along with full download options)
 - Personalization (personalized pricing - initial purchases determine subsequent options offered)
- **Try-before-you-buy: Increases the number of consumers buying**
 - Results in 50% in download rate for free trial versus 2% for full-download without try before you buy
 - ~55% increase in purchase of full downloads compared to a service without “try-before-you-buy”
- **Addressable consumer base increases significantly**
 - Number of consumers who buy increases by addressing the pay-per-play and rental model consumer segments in addition to the full-download consumer segment
 - Full-downloads are not cannibalized with the introduction of new pricing options
- **Smart service discovery: Increase in repeat use**
 - 48% of the consumers who played then downloaded another game from the in-game catalog
 - Reduces drop-off after free trial expiration of first download
 - Reduces number of clicks to access another game to try it

Revenue Impact for Operator, Content Provider

	Typical Games Service	July Games Sampler Store
No. of visitors to WAP site	100	100
Download rate	2%	50%
Number of users	2	50
No of downloads/user	1	1.7
Total games downloaded	2	85
Transport revenue per game	\$1	\$1
Total Transport revenue	\$2	\$85
Conversion rate visitors to paid use	2%	10%
Total number of purchaser	2	10 (~3 full download, ~3 rental, ~3 pay per view)
Average retail price realized per purchaser	\$5	\$3.5
Total Content revenue	\$10	\$35
Total revenue	\$12	\$120

Transport revenue up to 40x – Content revenue up 3.5x