

Breakthrough Innovations in Mobile

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An Entrepreneur and Investor in India Internet and Mobile space

- 1994-2000: IndiaWorld
 - India's first Internet portal; Self-funded
 - Acquired by Sify in Nov 1999 for \$115 million in one of Asia's largest Internet deals
- 1998-now: Netcore Solutions
 - Managed Mail & Security Services for Enterprises
 - Mobile Data Services for Consumers & Enterprises
- 2005-now: Emergic Venture Capital
 - Investments in creating India's Digital Infrastructure

INDIA
WORLD

netCORE
Mobile & Enterprise Messaging

Novatium
Network Computing

Rajshri Media
Digital Media

midas
Wireless Technology

mChék
SAFE · SMART · SIMPLE
Mobile Payments

valuefirst

MOBIFUSION
Mobile Applications

greyium
Language Portals

Yos Technologies
Continuous Healthcare
Online Healthcare

NEW
LONDON
MEDIA

Language Publishing

InteliZON
Solar for Rural

The Guiding Philosophy of Emergic (Breakthrough) Innovations

Bold and
Ambitious
Goals

Focus on Local
Non-
Consumers

Simpler and
Cheaper

Limited
Legacy helps
Leapfrog

Made in India, Made for the World

<http://emergic.org>

Think of India's Mobile Base as split in Two Large Markets

- **Red Market**
 - 100 million users
 - Mix of Enterprise and Youth
- **Blue Market**
 - 250 million users
 - Mix of Urban and Rural
- **Enterprise: “The Computer and Internet In Your Hand”**
 - Mobile Multimedia Computer
- **Youth: “Mobile Maane More”**
 - Communities and Entertainment
- **Urban: “Ek Ring Aapki Zindagi Badal Sakti Hain”**
 - Micro-Local Marketplaces
- **Rural: “Haath Mein Mobile, Saath Mein Zindagi”**
 - Access to Info, Markets, Education

Going ahead, these two markets will evolve very differently

India's Red and Blue Mobile Markets

Red Maange More *The Blue Billion*

- Saturated Market : mix of Business and Youth
 - Future Needs go beyond Voice and P2P SMS
 - “Give Me More”
 - By 2011
 - Will grow to 150 million in 3 years, at CAGR of 15%
 - Driven by Data Services
 - Complement with Superior User Experience
 - Support for rich media and user-generated content
- New Consumers: mix of Urban and Rural
 - Needs are for Low-Cost Handset and Voice
 - “Connect Karo”
 - By 2011
 - Will grow to 500 million in 3 years, at CAGR of 35%
 - Driven by Voice
 - Enhanced with Income-increasing Data Services
 - Support for local languages and voice navigation

3 Key Breakthrough Innovations will power Mobile in the next five years

- The coming **Mobile Internet Era**
- The opportunity for New Business Models – **VAS Operators and Data MVNOs**
- The emergence of the Mobile as the Next Advertising and **Marketing Medium**

1. Mobile Internet Era

- Killer Combo: Smartphones + 3G + Low/Flat-rate Data Plans
- Usage led by India's Red Market
- Mobile as first (and only) Internet access device
- Driven by Social and Rich Media
- The Creation of the N3 (Now-New-Near) Web
 - PIN-News, MicroContent, Location
 - Free + Push + Permission + SMS

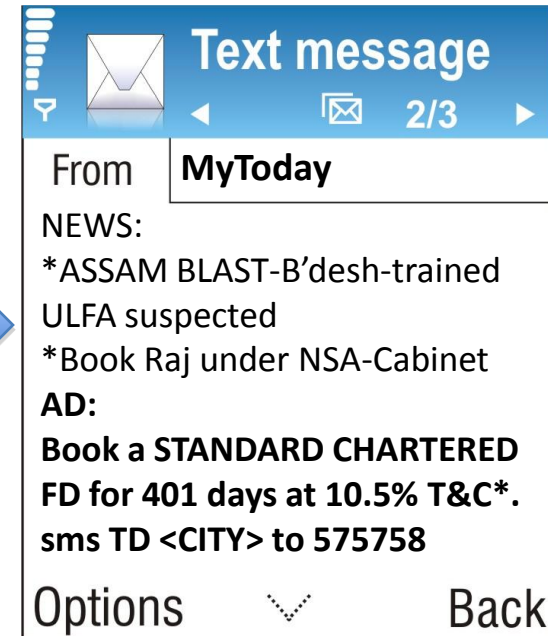
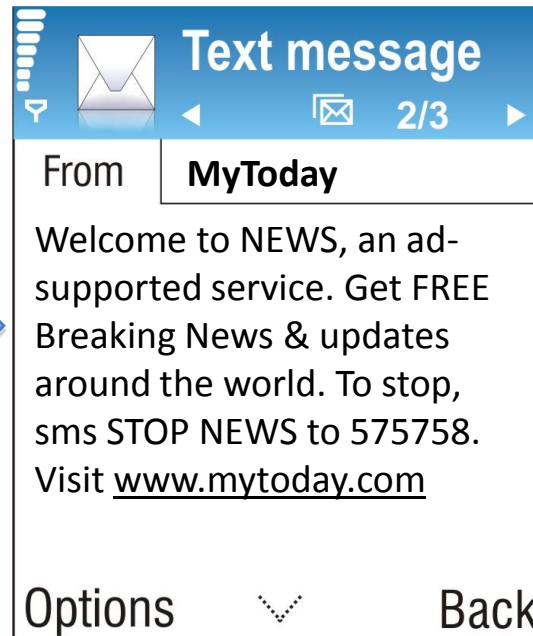
2. VAS Operators and Data MVNOs

- Direct-to-Consumer Mobile VAS companies
- VAS (Data), not Voice, will be key driver for India's Red Market
- Multi-monetisation from Subscribers, (micropayments), Advertisers and Businesses
- \$10 billion market opportunity
 - 50 million Youth and Enterprise subscribers
 - \$15+ (Rs 750) ARPU

3. Mobile as Next Marketing Medium

- A Mobile Presence for Businesses
 - SMS, Mobile Internet, Voice, Apps
- Customer Acquisition
 - Mass and Targeted Ads
- Customer Engagement and Retention
 - Invertising and Mobile CRM
 - Interaction: Feedback, Polls, mCoupons
 - Building Communities of Interest

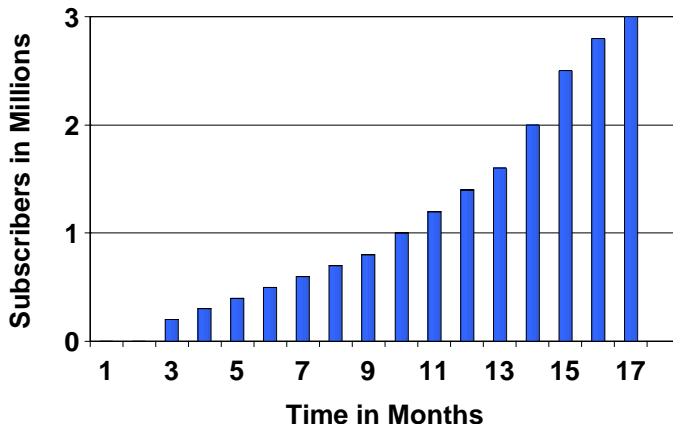
NetCore is using SMS Subscriptions to build Audience and Monetisation



Text Search : Internet ::
SMS Subscriptions : Mobile

Media on Mobile

- 50 channels
- 3.7 million subscribers
- 11 million subscriptions
- 13 million SMS daily



Nielsen Study

- Avg. Subs. Age is 25 yrs
- 84% get info first from MyToday
- 75% read every SMS
- 40% forward SMS

- 43% have seen Ads
- 30% of them have responded to Ads

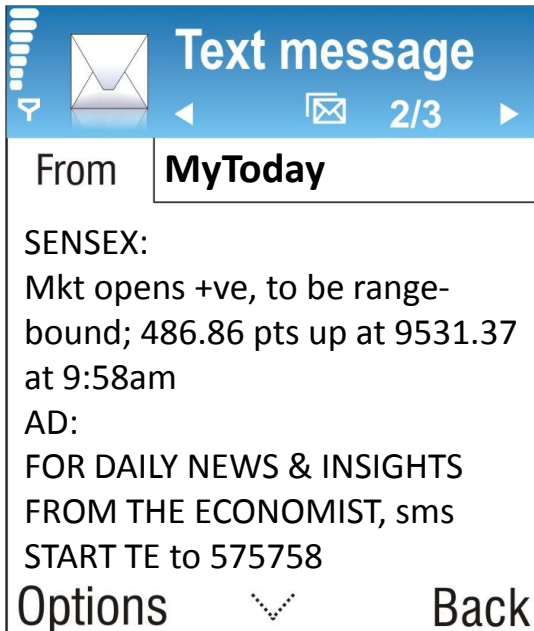
NetCore is creating Multi-Monetisation of its mobile Audience and Platform

Audience Monetisation

- Ads (250+ campaigns)
- Leads
- Paid Channels

Platform Monetisation

- Enterprises (Invertising)
- Operators
- Publishers





Mobile as Magic Lamp

Mobile Consumers want
Wishes to come True. *Now!*



*Be the
Genie and
Make the
Magic
Happen!*

