

viewpoint

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Over the last few years, there has been a silent revolution in banking around the world as more and more banks have discovered the power of mobile—and how it is changing the way they interact with their customers. *page 2*

Industry Insight: “SMS Hubbing: A Realistic Assessment”

Peering—along with inter-operator hubbing—is the primary reason SMS has reached its high levels in North America. Sybase 365 has extended that peering model to include multiple hubs around the world. *page 3*

Country Focus: “Africa’s Continued Mobile Growth”

South Africa is an interesting and exciting market for Sybase 365. Several trends have enabled the rapid development of mobile data and mobile messaging community and enterprise services. The mobile content and entertainment industry is growing fast, as well. *page 6*



SPOTLIGHT



Sybase 365 recently began **DELIVERING THESE MESSAGES FOR MLBAM**, and the relationship has been **SUCCESSFUL FROM THE OUTSET**.

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EVENTS

Mobile Asia Congress & Roamfest 2007
12-15 November, 2007
Macau

Sybase Tech Day
15 November, 2007
Beijing, China

ACM 2007 Expo + Forum
20-22 November, 2007
Kuala Lumpur, Malaysia

GSM 3G AfricaCom
21-22 November, 2007
Cape Town, South Africa

A complete list can be found on page 11

Executive Corner

Sybase 365 is One Year Old!

by Marty Beard, President



As we approach our one year anniversary, I want to share my overview of what Sybase 365 has achieved since the new subsidiary was created in November of 2006, as well as my vision moving into the new year.

New Division

As a new division, we feel very good about four key achievements. **One**, we successfully created Sybase 365 as a new division within Sybase, while maintaining—and building upon—the momentum and customer focus established by Mobile 365. We are continuing to provide outstanding services to our operator customers, our content provider customers, and our enterprise customers, and this was made obvious by our recently announced financial results.

New Products and Services

Two, we have introduced several exciting new products and services. We recently launched Sybase® mBanking 365, our combined mobile banking suite, to send banking alerts that provide banking customers with timely and up-to-date information about their bank accounts. We are very aggressively building our sales pipeline for this product, and have generated interest around the world.

During CTIA in October, we launched MMS 365™, a unique product that enables mobile users to interact with content providers and their Web sites via MMS—uploading and downloading images, videos, music, and so on. During



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Product Spotlight

Mbanking: The Rise of the Mobile Channel for Banks

by Diarmuid Mallon, Vertical Markets Senior Offer Manager



Over the last few years, there has been a silent revolution in banking around the world as more and more banks have discovered the power of mobile—and how it is changing the way they interact with their customers.

Like all progress, the first steps were faltering for those who led the way. Early adopters tried squeezing their Internet banking sites onto tiny form factors of late 1990s mobile phones. Given the low adoption level of the technology at the time, combined with the then-glacial speed of WAP, these services were unfortunately doomed before they were even launched.

In the following years, a number of banks discovered the power of the text message as a delivery mechanism to send information and services to their customers. These banks have launched with simple services based around the push of timely information, such as bank balance updates or transaction updates.

Today, more and more banks are discovering that the universal support of SMS enables these services to be significantly more successful in reaching their customers than previous attempts.

Introducing Sybase mBanking 365

We are now seeing these initial pioneers looking for the next stage in the evolution of mobile banking (mbanking); banks who have been sitting on the sidelines are now looking for an mbanking solution that can be quickly and economically rolled out to their customers.

Sybase 365 is proud to present our complete solution for the next stage in mbanking—Sybase mBanking 365.

Sybase mBanking 365 brings together Sybase's proven ebanking technologies with our world-class operator connectivity to enable banks to offer a mobile banking service to their customers. Sybase mBanking 365 is unique as it is the first commercial mbanking platform that enables banks to fully exploit the potential of the mobile phone across SMS, WAP, and rich phone-client, with support for balance statements, fund transfers, and bill payments.

Why Sybase mBanking 365?

Existing solutions focus on a single mobile channel—SMS, WAP, or Java. The problem with this approach is that each channel has its own

characteristics that make it more suitable for particular services. So by forcing services into a single channel, you limit both the customer experience and, more importantly, the reach of the service.

For example, banks today are discovering that a large proportion—up to 25%—of calls to their call centers are from customers requesting bank balances. A call center, even an IVR-based one, is a costly channel for supplying this type of basic information. Offering an alternative method of retrieving bank balances—via an SMS-based solution—enables banks to exploit the ubiquity of SMS to reach the largest proportion of their customers.

Equally, a bank wishing to offer payment services can use the customer-friendly interface that a WAP or phone-client solution offers to provide an easy-to-use service for advanced customers.

With Sybase mBanking 365, banks no longer have to choose a single channel for their mobile banking offering. With a single point of integration supporting all channels, time-to-market and operational costs are minimized. Banks can launch with a single channel, and bring additional channels online when needed.

Sybase mBanking 365 is further enhanced with a support for natural language interactive SMS banking, guiding customers through day-to-day banking activities without having to remember account numbers or complex keywords.

Exploiting Sybase 365's Worldwide Messaging Infrastructure

Built into the heart of Sybase mBanking 365 is the mobile connectivity provided by the Sybase 365 messaging infrastructure, with its reach across 700 operators worldwide.

This frees up banks from getting local agreements with every operator in a country or region, and ensures quick and dependable deployment of services. And, with the proven scalability of our infrastructure, banks have a partner who is able to support them from service launch to continued growth.

Sybase mBanking 365 is the only single-vendor solution for mobile banking—with telco integration, software, and services all offered by one vendor—with a proven global presence and credibility. |||

Industry Insight

SMS Hubbing: A Realistic Assessment

by William Dudley, Senior Director, Messaging Products

The bi-lateral relationship on which many early GSM interworking success stories were based is now becoming a limiting factor to future success.



One of the primary assets of global SMS “reach” is the number of directly connected operators available to a given operator. Even more important, however, is the ability to offer full two-way connectivity between the greatest number of operators possible. In fact, “two-way reach” is one of the clear differentiators that places Sybase 365 ahead of all other SMS hub providers in the world.

In today’s global SMS marketplace, there are approximately 800 operators worldwide who offer some sort of international SMS capability. While we, as the leading global SMS hub provider, have more two-way destinations than any other hub provider in the world, the reality is that we will not win them all. As such, we peer with other hub providers—and extend our reach to as many operators as possible.

In the past, peering has helped us manage the vast majority of U.S. and Canadian operators. Today, peering—along with inter-operator hubbing—is the primary reason that SMS has reached its current high levels in North America. Sybase 365 has extended that peering model to include multiple hubs around the world, benefiting all regions.

Background: The GSM Association SMS Hubbing Initiative

In 2005, the GSM Association (GSMA) established the “Open Connectivity” initiative. The GSMA has recognized that roaming and interworking have been, and continue to be, at the core of the GSM success story. GSM subscribers now expect to access the same set of services whether at home or abroad.

The bi-lateral relationship (operators connecting directly to each other, utilizing GSM AA19 agreements) on which many early GSM interworking success stories were based is now becoming a limiting factor to future success. With over 600 operator members of the GSMA, diversification of services, and an increasing number of access technologies, it is unlikely that the current paradigm of bi-lateral relationships between networks will meet the expectations of operators going forward.

The overall cost of establishing bi-lateral relationships prevents some operators from opening new roaming and interworking agreements. Often, when a new roaming relationship is taken individually, the venture represents insufficient additional value for an operator that is already established with other roaming partners in the region, or when the volume potential is low.

With the introduction of new services, the problem will become even more evident—and the overall costs will become greater. This has historically been a particular concern for the newer GSM networks. Mobile operators who were late entries into the market were finding it difficult to establish roaming, as well as messaging interworking relationships, with the more established (and in many cases, larger) operators.

At the same time, the problem is arising for many established operators who already have voice roaming open, but are facing low return on investment for new 2.5/3G roaming relationships and messaging interworking ventures.

Consequently, GSMA has defined Open Connectivity as the following:

- For all roaming services, to ensure that an operator is able to allow its customers to roam on the network of any other GSMA member.
- For inter-working, in the short-term to ensure that the customers of all GSM networks can send and receive services between themselves. In the long-term to ensure that the customers of all GSM networks can send and receive services between themselves and customers of non-GSM networks.

In reality, Open Connectivity applies not only to SMS, but also to MMS and IMS services. One of the key elements of achieving Open Connectivity is the concept of the “hubbing service.” Hubbing refers to a solution where the vendor’s platform (e.g. hub) intervenes in the development and operation of interworking and/or roaming services between mobile operators. Starting in the summer of 2006, Sybase 365—and a number of other hub providers—participated in GSMA-sanctioned hubbing trials.



Industry Insight

iPhone and Messaging Update

by William Dudley, Senior Director, Messaging Products

There are several handsets on the market—with MMS, mobile IM, touchscreens, and more—that are potential iPhone killers.



In the previous issue of *Sybase 365 Viewpoint*, we noted that the Apple iPhone does not support MMS and mobile IM as native clients. As of this writing, this is still the case; however, despite this, the Apple iPhone has spawned new terminology: “the iPhone killer.” These are handsets aimed squarely at the iPhone market, with very similar features.

The publication *PC Today* dedicated an entire issue to the “Post-Hype iPhone,” as has the *MacLife CellPhone Handbook*. These, and many other publications, are providing extensive iPhone coverage. And each of these publications now has articles with titles such as “13 Phones That Do what the iPhone Can’t.”

There are now several handsets on the market—all with MMS, mobile IM, touchscreens, and more—that are potential iPhone killers. Many have dubbed the LG Prada handset an Apple iPhone clone; however, the LG Prada’s concept actually pre-dates the iPhone’s release.

Other handset manufacturers are also launching “concept phones.” Samsung and Bang & Olufsen recently introduced the Serenata, a new music mobile phone. It is interesting to note that Samsung stated the following in its press release: “To offer enhanced multimedia functions, Samsung brings High Speed Downlink Packet Access (HSDPA) connectivity to Serenata. With 3.5G connectivity, users can enjoy full multimedia features including music and video, e-mail, MMS and instant purchase and download of music tracks.” This phone, however, does not feature a camera.

Nokia has long pitched its super-phone, the N95, against the iPhone, and there is no comparison. With its 5-Megapixel, Carl Zeiss-lens camera, support for WCDMA (UMTS), and more, the N95 provides almost any function you can image. To see it in action, go to www.youtube.com and view the iPhone vs. N95 comparisons.

T-Mobile has launched a touchscreen handset called the Pharos GPS Phone 600. Pharos is a GPS company—not a mobile handset company. Reviewers have noted there are better alternatives; still, it does have many features similar to the iPhone, including support for Wi-Fi, as well as all messaging and camera functionality that consumers expect from today’s mobile phones.

So is there a single “iPhone killer” out there? Not necessarily—but there are many being launched and many more to come. Apple has already begun the process of updating their software via Over-the-Air (OTA) downloads, and I expect that before they are done they will include integrated MMS and mobile IM clients.

My question in the previous issue of *Viewpoint* was: will the Apple iPhone influence mobile messaging? Based on the response of iPhone competitors, the industry, the blogs, and the reviews, the answer is a definitive NO—the iPhone will not influence mobile messaging.

None of the supposed “iPhone killers” have the deficiencies of the iPhone. And, I am betting that soon, neither will the iPhone. Apple is too smart to let these go much longer—especially with Europe and the rest of the world knocking on their door. |||

Case Study

Carphone Warehouse Teams with Sybase 365 to Become the First Independent Phone Retailer in the U.S.

Carphone Warehouse has evolved from being the UK's leading mobile phone high-street retailer into Europe's leading independent all-around communication retailer, featuring over 2,000 stores in ten countries. Now, with the help of Sybase 365, they are setting their sights on the U.S.

Not wanting to rest on its laurels, Carphone Warehouse has announced plans to consolidate its position as the number one communications retailer by expanding into the U.S., and by becoming the partner of choice in the lucrative enterprise space. Having entered into a partnership with Best Buy, the largest electrical retailer in the U.S., Carphone Warehouse intends to become the country's first independent mobile phone retailer. Achieving its U.S. vision will permit the company to take another step towards becoming the largest global independent retailer of mobile phones and services.

Expanding into new territories also places new challenges on communication, both internally across its 11 countries, as well as to its customers—and to a communications provider, communication is everything.

"To meet our global ambition, we needed a global partner," says Alex Hampson, Commercial Manager at Opal Telecom, part of Carphone Warehouse Messaging Solutions (which presides over the company's internal and external messaging solutions). Says Hampson, "As a subsidiary of a large U.S. operation, Sybase 365 gave us a lot of comfort for our preferences for a large scale deployment to work with best-of-breed solutions to match our own ambitions."

Carphone Warehouse uses mobile messaging in a number of ways across the group. On the consumer side, messaging is used as a means of maintaining strong links to its customers. "A lot of the services are based on informing customers of special offers, telling them when their contracts are up for renewal, and helping them choose new contracts," says Hampson.

Now Carphone Warehouse has set its sights on becoming the leading communications provider to the enterprise sector. Hampson says that Carphone Warehouse's partnership with Sybase 365 will provide the opportunity to deliver a wide range of enterprise solutions and mobile data products to the marketplace.

"With the development resources that Sybase 365 has, the quality and reach around the world—as well as the direct connections and relationships with operators around the world—Sybase 365 is the ideal partner," Hampson said. "For our own customers, many have either overseas operations or ambitions. That was one of the big messages that our customers responded to very positively."

Messaging has also become a far more time-sensitive and responsive medium than email, a theme that is resonating with Carphone Warehouse's enterprise customers. For example, Carphone Warehouse has identified messaging as a powerful tool for credit card companies to increase communication and efficiency leading to improved response rates, lower overhead, and improved customer services—extended across all divisions of enterprises.

Says Hampson, "Messaging is a far more powerful proposition than email." And given the expertise that Sybase 365 has accrued having operated in the banking and financial sectors where secured solutions are a prerequisite, Carphone Warehouse is excited at the prospect of exploiting that knowledge and leadership, and applying it to its own customer base.

Carphone Warehouse recognizes that messaging is becoming more about the application and delivery of business communications tools to customers. Within the enterprise space, messaging is still very much in the early-adopter phase, but is gaining recognition on a daily basis. That is why Hampson says Carphone Warehouse wanted more than just a straightforward aggregator, but "an enterprise partner."

"It is about real-time communication," Hampson says. "It's about looking at market sectors and identifying the big issues that businesses have, and bringing the power that messaging brings with the associated immediacy." After all, he is the man overseeing Carphone Warehouse's goal of delivering enterprise tools used by the world's biggest blue chip companies. And Sybase 365 is helping make that happen. |||

"It is about real-time communication... about looking at market sectors and identifying the big issues that businesses have, and bringing the power that messaging brings."

Market Trend

Mobile Banking: A Global Perspective

by Diarmuid Mallon, Vertical Markets Senior Offer Manager

With the year drawing to a close, it is an ideal opportunity to take stock of 2007. As I write this article in autumnal London, it is almost 12 months to the day from when we commissioned our first consumer-focused m banking survey.

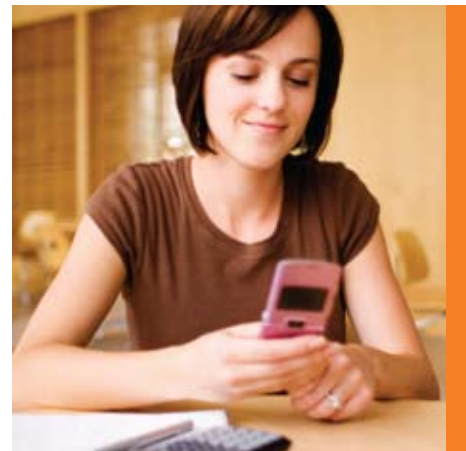
In Q1, I had the opportunity to share our EMEA survey results with banks across Europe during our inaugural banking seminars in Paris, Frankfurt, and London. This was followed by the Americas survey results (Argentina, Brazil, Canada, Mexico, and the U.S.), which were initially announced at Sybase's annual TechWave event in Las Vegas in August 2007. Following in quick succession were our September m banking seminars held in Mumbai, Singapore, Hong Kong, and Taipei, where results of the Asia-Pacific study were presented.

Two main themes emerged from these global surveys and the subsequent seminars: how alike consumers' needs are around the world, and how differently m banking is utilized from place to place.

In terms of m banking services, having mobile access to an account balance topped the list of desired features in every country. The results also showed a strong demand for account informational services (transaction alerts, fraud alerts, etc.), which scored high across the board. This demonstrates that m banking consumers are looking—not surprisingly—to keep a tight hold of their purse strings, irrespective of country.

Some of the biggest differences were clearly in current adoption rates of mobile banking services throughout the three regions surveyed—7% of Europeans have used a mobile phone to check their balance in the last three months, compared to 8.7% of respondents in the Americas and 15.4% in Asia-Pacific. In terms of having used some sort of mobile banking, India leads the way with an impressive 50%, followed by Brazil at 22%. Clearly, banks in these regions are managing to reach beyond online banking users to a wider customer base.

All three of our regional m banking surveys are now available from the Sybase 365 home



page at www.sybase.com/mobileservices. In addition, we have also prepared a global summary, which provides a high-level view of the results across all 15 countries—and the 6,500 responses we surveyed.

Looking forward to 2008, we are already working on our next round of surveys and I look forward to telling you about that in the New Year. |||

Country Focus

Africa's Continued Mobile Growth

by Erik Van Thielen, Country Manager, Africa

South Africa is an interesting and exciting market for Sybase 365. ARPU is growing, and the low Internet penetration rate is compensated by mature corporate messaging and third-party billing (ranging from bulk SMS and Premium SMS to MMS). This has enabled the rapid development of mobile data and mobile messaging community and enterprise services.

Indeed, South Africa's mobile instant messaging, mobile banking, and mobile CRM landscape is very mature compared to most European markets, with respect to the number of messages exchanged and the broad acceptance of these services—by both subscribers and the industries who adopted SMS, WAP, USSD, and mobile data services.

The mobile content and entertainment industry is growing fast, as well, and benefits from the increased WAP-enabled handset penetration are on the rise. This growth provides a larger audience to providers of rich content (ringtones, wallpaper, games, etc.), mobile Internet content,

and interactive services, such as mobile blogging, dating, and IM.

Sybase 365 enables international brands and content providers to deploy mobile services locally to reach their customers. Brands, banks, and service providers operating from South Africa gain a unique opportunity to deploy mobile services both locally and internationally—through a single technical and commercial interface.

In terms of reach, Sybase 365 recently announced the signing of group agreements with the largest mobile companies operating in Africa.

Sybase 365 is now connected to 97 of the 117 African mobile operators. This enables us to deliver to more than 180 million mobile subscribers, providing Africans with an affordable communication link to the rest of the world.

For many African operators, the ability to support their roaming mobile subscribers has been extremely problematic, as most do not have



two-way bilateral roaming agreements in place. If a network operator becomes a Sybase 365 customer for inter-operator SMS delivery, this problem is solved.

Customers view Sybase 365 as a "global roaming agreement facilitator." These agreements contribute to Sybase 365's unrivaled global footprint, reaching more than 700 mobile operators around the world. |||

P2P Overview

Sybase 365 Extends its Inter-operator Connectivity into North Asia

Sybase 365 recently announced that it is now providing International Short Message Service (ISMS) to KTF, broadening their reach to the world. The partnership expands Sybase 365's North Asia connectivity across China, Japan, South Korea, and Taiwan, through agreements with KT Freetel, South Korea's prominent mobile operator with more than 11 million subscribers; LG Dacom, part of the LG Group in Korea; Taiwan Mobile; and Vibo Telecom.

"North Asia continues to be a major market for Sybase 365, and these agreements prove that we remain the first choice for North Asian operators seeking global and cross-technology messaging connectivity," said Marty Beard, president, Sybase 365.

With such an extensive network, Sybase 365 is now in a stronger position to provide a single point of contact for these four newly-added operator partners for global messaging connectivity, while providing new international communication opportunities for existing customers in the North Asian region, including China Mobile and NTT DoCoMo.

These new agreements further broaden Sybase's unrivalled global footprint and connectivity across Europe, the Americas, and Asia-Pacific, reaching 2.2 billion mobile subscribers worldwide, and providing two-way messaging connectivity to more than 90 operators in Asia. The addition of KT Freetel and LG Dacom extends Sybase 365's connectivity in Korea, enabling 100 percent reach to mobile subscribers in the country. |||

Company News

Answers 365

Introducing Answers 365

"Natural language" is the new paradigm for A2P messaging. In 2004, Sybase purchased a company called Dejima. The core intellectual property of that acquisition was a set of development tools for building natural language user interfaces.

Natural language is an important emerging technology that enables users to interface with applications using their own words. Rather than having to learn a list of keywords or wade through endless menu trees, users can simply ask for the information or services they want via SMS, just like they would say it out loud. The technology is even smart enough to comprehend synonyms, "SMS speak," slang, and misspellings. It can even understand multipart and compound requests, so a user can input whole sentences, as opposed to one word or request at a time. As a result, interacting with applications becomes intuitive—there is no learning curve.

When Sybase acquired Mobile 365 last year, it was easy to see that natural language would be a great fit with Sybase 365's messaging services, as subscribers don't have to learn a set of specific keywords.

Natural language enables users to ask for what they want—a bank balance, the phone number of their favorite restaurant, the status of their loan application, the latest ringtone, and more—in their own words.

Answers 365 in Asia

Answers 365—with its cutting-edge solutions platform that provides users with the power to use natural language to search, surf, and transact—is seeing tremendous market traction in Asia. In places such as India, where keyword-based services see a 40% loss in traffic, Answers 365 is being embraced by enterprises across industries, as users are no longer bound by syntax and grammar.

Answers 365 is attracting significant interest across markets in India, the Philippines, Singapore, Malaysia, Hong Kong, and Taiwan. The technology has also resonated particularly well with banks. Answers 365's natural language technology is a key component of the Sybase mBanking 365 platform, providing account balance inquiry, electronic statements, fund transfers, and bill payment—all via an intuitive SMS interface.

Answers 365 is best deployed in complex scenarios where users need to access many silos of information. Typically, when people text keyword-based commands to mobile shortcodes, failure rates of between 20-40% are common. Natural language increases the number of users—and the amount of usage—considerably; a live case study in Asia recorded a 300% jump in traffic. The other advantage of Answers 365 lies in its multimedia capability—it is currently deployable on SMS, WAP, Web, and email.

With the Asia-Pacific region being quick to adopt new technologies, it is no surprise that several deals are already closed, with more to follow. A large service provider in the Philippines will soon be using Answers 365 to create a user-friendly local search service via SMS. A leading media company in India will be the platform to enable their customers to find and access content and services. We also have several pending deals with banks throughout Asia, to provide services such as ATM and branch locators. |||

Company News

MMS Success at CTIA

We hear a lot these days about how social networking sites have changed the Internet landscape, but what about the old “bricks-and-mortar” booth at a major trade event? More plastic and fiber than bricks and mortar, the booth is also a networking site—more business than social—and it continues to do its job.

Sybase 365 had a big presence at the recent CTIA tradeshow in San Francisco, California. We announced our new MMS 365 product, participated in the Monday “Mobile Entertainment Live!” event (as both sponsor and speaker), hosted a customer event for show attendees, and presented on-booth MMS educational sessions.

On Monday, Sybase 365 was at Billboard Magazine’s “Mobile Entertainment Live!” conference in full force. A longtime, major sponsor of this event—which brings together executives and other leading entertainment industry figures to discuss mobile strategy—Sybase 365 presented the case for MMS as the ideal delivery mechanism for rich mobile entertainment. At our booth in the networking room, Sybase 365 showed attendees demos of our current offerings, and Michael Kurtzman (Managing Director, North America) was featured in Billboard’s “Ask the Expert” program, fielding questions about MMS and other content and application initiatives.

On Tuesday and Wednesday, William Dudley, Senior Director of Messaging Products, presented “A Clear Case for MMS,” 15-minute micro-presentations presenting the many successes and benefits of MMS. Anticipating the 15-minute sessions—and the potential to win an iPod—people began gathering and depositing their business cards in the glass jar for the drawing to follow the Q&A at the end.

Bill’s presentation naturally aligned with the announcement of our new multimedia content delivery gateway—MMS 365—which sends and receives MMS content from multiple sources,

enabling content providers, marketers, and media companies to deliver MMS content directly to a consumer’s handset worldwide, with a single connection.

The message was clear: MMS is—and will continue to be—an extremely viable alternative for the delivery of rich media in the U.S. and elsewhere. For many markets, P2P MMS usage is now approaching 40% of subscribers. This means that MMS is now viable enough that content providers can use MMS to deliver rich media content to subscribers. In addition, MMS is the perfect medium for subscribers to deliver rich content into applications such as blogs, photo albums, social networking sites, and other applications.

The latest MMS numbers show that 16% of the U.S. mobile population has used photo messaging, while in the U.K. it is more than double that. In Spain and Italy it is 30%, in France 21%, and in Germany 20%. By the end of 2007, Sybase 365 will have processed more than 1 billion MMS messages in the U.S. since Sybase 365 launched the service in 2005. Not surprisingly, due to the dominating presence on the mobile Web by Gen X and Y, MMS is most popular with young adults, according to research firm M:Metrics. More than one-third of users aged 18 to 24 are sending MMS messages.

MMS 365 runs on Sybase 365’s operator-grade network, ensuring the successful delivery of complex content, management of high traffic volumes, and seamless delivery to consumers’ handsets through its connections to more than 700 global operators. One connection to MMS 365 provides direct content delivery to millions of subscribers, eliminating separate, time-consuming negotiations and connections to individual operators.

To view Bill’s MMS presentation from CTIA, go to www.youtube.com, and search for: “Sybase 365 CTIA.” |||



- Sybase 365 Continues Rapid Expansion into Africa – 21.11.2007
- Sybase 365 Pioneers Natural Language Service for Mobile Messaging – 12.11.2007
- Sybase 365 Continues to Expand its Inter-Operator Connectivity into North Asia – 12.11.2007
- Sybase 365 Launches New MMS Content Delivery Gateway – 23.10.2007
- Sybase 365 Announces 11th Consecutive Quarter of Growth for MMS Message Delivery – 23.10.2007
- Sybase Launches mBanking 365 – 22.10.2007
- Research Reveals Global Appetite for Mobile Banking Services – 9.10.2007
- Sybase Unwired Enterprise Solutions Wins Ten Mobile Star Awards – 5.10.2007
- Sybase 365 Consolidates Reach into Africa & Middle East with New Regional Mobile Messaging Hub – 24.9.2007
- Research Reveals U.S. Consumer Obsession with Bank Balances – 11.9.2007

Case Study

MLB Advanced Media



MLB Advanced Media (MLBAM) wanted to make mobile alerts available to their fans, including breaking news, scores, player transactions, fantasy league news, and so on. Sybase 365 recently began delivering these messages for MLBAM, and the relationship has been successful from the outset.

Sybase 365 currently provides connectivity for numerous MLB.com shortcodes, and both standard rate and Premium SMS (PSMS) programs are run in the U.S. and Canada on the shortcode “65246” (MLBGO). Standard rate programs include in-stadium and on-air campaigns that MLB.com is running for teams, sponsors, and broadcast rights holders, as well as an on-demand score service called TeamTXT.

Fans can also subscribe to receive a vast array of “live” information. Player Alerts provide instant updates on player achievements including home runs, runs batted in (RBIs), stolen bases, strikeouts, fantasy news, and end-of-game summaries. Team Alerts include post-game summaries, breaking news, transactions, injuries, home runs, and late-game lead changes. The monthly subscription plan costs \$3.99/month, and provides updates within seconds of live action.

MLBAM is also using the service to conduct targeted marketing outreach, such as trivia contests, in-venue contests, player alerts, team alerts, and so on. MLBAM also runs standard rate programs for other sports properties, such as Tiger Woods and Major League Soccer.

This program enables MLB.com fans to stay connected wherever they are, and to get news, game summaries, and in-game alerts that keep them connected to the action. Getting instant news and statistical alerts from their favorite teams is an important value-add for fans, and the low monthly cost has been an attractive feature.

Anyone interested in registering for the service should visit www.mlb.com/mobile. The service works on most North American operators, and subscribers are charged on their monthly mobile phone bill. |||



Sybase 365 maintains an active and comprehensive Intellectual Property program, including issued patents and pending patent applications, to protect key elements of Sybase 365 technology.

New P2P Operators, 2007

Americas

Entel (Bolivia)

Leap (U.S.)

Mobi PCS (U.S.)

Nucleo (Paraguay)

Sonopia (U.S.)

Asia-Pacific

Aircel Cellular (India)

Areeba (Afghanistan)

Babilon Mobile (Tajikistan)

Bakrie Telecom (Indonesia)

Blue Sky (American Samoa)

Cambodia Advance Communications Co. Ltd
(Cambodia)

Choice Phone (Guam)

Dialog Broadband (Sri Lanka)

Digi (Malaysia)

Etisalat (Afghanistan)

KT Freetel (South Korea)

LG Dacom (South Korea)

Maxis (Malaysia)

Mobile8 (Indonesia)

Taiwan Mobile (Taiwan)

Telikom PNG (Papua New Guinea)

VIBO (Taiwan)

EMEA

Cell One (Namibia)

Celtel (Nigeria)

Globacom (Nigeria)

Kievstar and URS (Ukraine)

Mattel (Mauretania)

MTS (Russia)

Rwandatel (Rwanda)

Telma (Madagascar)

TMN (Portugal)

Executive Corner

Continued from front cover

GSMA Mobile Asia Congress, we launched our natural language service—Answers 365—for mobile messaging, enabling consumers to interact with mobile service providers using their own words. These are significant, innovative offerings from Sybase 365, and we look forward to seeing them flourish in the marketplace.

Going Global

Three, we have successfully strengthened our infrastructure by leveraging Sybase's global presence. We have access to corporate international sales offices, worldwide customers, marketing, product development, and consulting. We go to market together. A recent example is the agreements established with Sybase resellers.

These agreements enhance our sales pipelines, and give us wider reach into target areas. As of this writing, we have a signed agreement in place with South Africa. This will both extend our footprint in that country, and help us expand into Sub-Saharan Africa. Look for more reseller announcements in the Q1, 2008 issue of this newsletter.

Looking Good On the Bottom Line

Four, are very proud of our recent financial results. We are growing the company very profitably, and increasing its financial strength. Both revenue and profit have grown quarter-on-quarter, and Q3 demonstrates the strongest evidence of that, with reported earnings of \$34.3 million and a 12% operating margin.

Into the Future

My vision moving into the new year involves extending our lead and strengthening our market position as the recognized global leader in mobile messaging interoperability, mobile content delivery, and mobile commerce services. Thanks to Sybase, we have a unique advantage over our smaller competitors, and we will be using that to extend our global market share.

The majority of our revenue comes from international markets, and it is not by accident that our largest office is in Singapore. We are very actively involved in the Asia-Pacific, EMEA, and Americas communities. We serve customers all over the world—and that means we can get our customers anywhere they want to go.

For example, we recently announced the launch of the Africa and Middle East Exchange (AMEEX) mobile messaging hub, which enables us to expand further into this fast-growing region and offer international SMS services to more than 250 million subscribers. Subscribers of the mobile operators served by this regional hub will be able to send and receive text messages from all parts of the world. The number of subscribers in this region has grown faster than any other region in the world in the last 12 months, and this rapid growth trend is expected to continue.

Conclusion

We want to be the most innovative company in this business. We are off to a great start in our first year, have exceeded many milestones, and are coming together with Sybase in a tremendously exciting way as we move into 2008. Stay tuned! |||

Mobile Asia Congress & Roamfest 200712-15 November, 2007
Macau**Sybase Tech Day**15 November, 2007
Beijing, China**Payments: The European Battleground**11-12 December, 2007
Brussels, Belgium**ACM 2007 Expo + Forum**20-22 November, 2007
Kuala Lumpur, Malaysia**GSM 3G AfricaCom**21-22 November, 2007
Cape Town, South Africa**3GSM Mobile World Congress**11-14 February, 2008
Barcelona, Spain**CTIA Wireless 2008**1-3 April, 2007
Las Vegas, Nevada, USA

Industry Insight

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Sybase 365 has been providing hub-based Person-to-Person (P2P) messaging interoperability services to the global market for nearly seven years. It can be said that the GSMA Open Connectivity initiative is an endorsement of the messaging ecosystem that Sybase 365, and a handful of other providers, have promoted and made a success of—despite the insistence of the GSM community's bi-lateral connectivity preferences.

Supporting the GSMA Hubbing Initiative

Sybase 365 has always been a supporter of most of the recommendations of the GSMA regarding SMS hubbing; however, some GSMA recommendations have gone against several business drivers that have made Sybase 365 a success in the SMS interoperability market. Sybase 365's stand on international peering has always been that we will promote value-based peering—that is, we peer with providers who provide the most extensive two-way coverage for our operator customers.


The many months that Sybase 365 has been engaged with Belgacom have taught us that most customers of other hub providers are not necessarily on board with Open Connectivity peering—i.e., not all routes of these other hub provider customers are available to our customers.

With over 25,000 possible routes, Sybase 365 has realized that a significant number of these routes are still not two-way. Typically, this is governed by the mobile operators themselves, who pick and choose the routes they send to the hub provider. In most cases, those operators still operate a large number of routes on a bi-lateral basis. The consequence for all hub providers is that route on-boarding to the hubs is incremental, and expectations must be managed carefully.

Still, for Sybase 365, our peering with Belgacom has added the possibility of new two-way connections for numerous operators; not all of the routes have yet been opened. Many routes require Belgacom to consult with their operator customers to encourage them to utilize our combined services.

Despite these challenges, we believe that by combining the two largest SMS hub providers via a peering agreement we have achieved many of the GSMA's goals. In addition, Sybase 365 has also engaged with regionally-focused hub providers, such as GMSU, to provide even more connectivity. We believe that additional smaller hubs, or operator-owned hubs, will further extend our reach beyond the nearly 400 operators that are available for two-way routes today.

In 2007, Sybase 365 launched our Africa and Middle East Exchange (AMEEX) mobile messaging hub to consolidate our position as the major provider of international SMS across Africa and the Middle East. These are prime examples of how Sybase 365 continues to focus our peering targets so we can better offer a regional hub to which operators can connect—and which reaches our global customer list.

For the remainder of 2007 and into 2008, Sybase 365 will continue to pursue the value-based peering policy that has worked successfully thus far. While some hub providers may be disappointed that they may be low on our priority list, we don't wish to enable other hub providers to extend their reach without having them provide any value to our existing customers. It will take a combination of peering—with regional hub providers, mobile operators moving to a hub-based solution from AA19 agreements, and new direct connections—to propel Sybase 365's international two-way SMS reach to over 500 operators by 2009. 



365

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