

Hi,

Welcome to the February edition of the Open Mobile Media newsletter.

Spring is almost in the air, and as the record attendance at the mobile world congress this year demonstrated, mobile is now mainstream. Forget the clouds, here comes the sun for our industry – and not a minute too soon.

It was great to see so many friendly faces in Barcelona this month – this was our best MWC ever with a tremendous amount of excitement for the 2011 Open Mobile Summit series. Read on for the latest developments...

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The Open Mobile Summit London: Launch offer sells out in 4 days

Congratulations to all of you who registered as part of our 'First 50' promotion. The first fifty tickets sold out in less than 4 days, which is unprecedented for the London event.

Confirmed speakers – June 8-9

The agenda for The Open Mobile Summit 2011: Connecting Everything, June 8-9 London is almost complete. Over 50% of the speakership is now confirmed, and the remaining 50% will be finalised in the next 2 weeks. I'm delighted to share the list of speakers confirmed to date:

Handset manufactures and Platforms

- Stephen Elop, CEO, **Nokia**
- Yongseok Jang, VP Mobile, **LG Electronics**
- Kevin Lynch, CTO, **Adobe**

Ad agencies, retailers and brands

- Ajaz Ahmed, Chairman and Founder, **AKQA**
- Steve Yankovitch, VP Mobile, **eBay**
- Will Pinnel, Head of Mobile, **Sabre / Travelocity**
- Rene Batsford, Head of IT, **EAT**

Internet and apps

- David Ko, SVP Mobile, **Zynga**
- Neil Stevens, GM Consumer, **Skype**
- Mark Curtis, CEO, **Flirtomatic**
- Julius Wiedemann, Director, **Taschen**
- Justin Siegel, CEO, **Mocospace**

- Loic Le Meur, Founder and CEO, **Seismic**

Mainstream media and TV

- Jim Eadie, SVP Digital Distribution, **MTV**
- Emma Lloyd, Director of Emerging Products, **BSkyB**
- Olivier Gers, CEO Worldwide Brands, **Endemol**

Operators

- Olaf Swantee, EVP, **Orange**
- Daniel Gurrola, VP Group Strategy, **Orange / France Telecom**
- Tanya Field, Director Mobile Data, **O2**
- Cenk Bayrakdar, Chief Product Officer, **Turkcell**

Analysts

- Ben Wood, Senior Analyst, **CCS Insight**
- Christian Lindholm, Managing Partner, **Fjord**
- Richard Windsor, Senior Analyst, **Nomura Capital**

Technology and innovation

- Ted Morgan, CEO, **Skyhook Wireless**
- Chris Barnett, EVP, **Vlingo**
- Giles Corbett, CEO, **ON**
- Joel Hughes, CEO, **Umber Systems**
- Gavin Stirrat, MD Europe, **Millennial Media**
- Ron Hirson, Co-founder & SVP, **BOKU**

As you can see the line-up features the business leaders of the major players and hottest start-ups across the fast converging mobile, Internet and media space.

We have a particularly strong showing from big media and the apps ecosystem in both Europe and North America.

You'll also see a greater number of enterprises, banks and retailers both speaking and attending this year.

New speakers are now being added daily

Agenda preview – Open Mobile Summit London

If you missed it last month, here's a sneak preview of the major themes we'll be discussing in London 8-9 June 2011:

Headline theme: Connecting Everything

Take your tablets

2010 was the year of the iPad. Will 2011 be the year of the tablet, or can Apple sustain dominance of this category? Which of the other tablets stand a chance and who should

you develop for? Plus learn from the lessons of early pioneers – how does app usage change on the iPad, what are the characteristics of app survivors and how should the unique features of the tablet influence app development and design?

Where the Smartphone meets the Connected TV

As the number of connected screens proliferates, how can we deliver a joined-up experience across them. With smartphones now a mass market phenomenon, tablet take up growing, and connected TVs about to arrive on the scene in a big way in 2011, how will these different devices interact? Find out what broadcasting and TV bosses think about the multi-screen future, and how mobile figures in their video, rich media and interactive service delivery plans

Operators and ecosystems of value: mHealth, utilities and more

Our operator Keynotes will share their visions for the overall role of the operator in the new mobile economy, the business model for mobile data and the role of operators in service innovation. Later on, we'll be exploring these new business models and service opportunities from a more holistic perspective – to shine a light on the emerging ecosystems of value in vertical markets such as mHealth, utilities, mCommerce and enterprise mobility.

Mobile advertising, mCommerce, and the enterprise open mobile opportunity

As the mobile Internet revolution gathers pace, mobility is higher than ever on the agenda of agencies, retail brands, banks and enterprise IT directors. These folks come to the Open Mobile Summit to understand how this highly complex market is evolving – from the future of devices and platforms through to new solutions for mobile commerce from advertising metrics through to tagging and contactless technology.

We'll be taking a deep dive into these areas, with the sessions "**mCommerce: Enter the brands**" (Steve Yankovitch Head of Mobile eBay and Will Pinnell Head of mobile Sabre already confirmed), **Apps and Enterprise IT** which explores how enterprises are beginning to leverage open platforms for productivity apps and cloud based services, and **Opening the Mobile Wallet** which explores the race to deliver contactless payments and more through smartphones.

Future of Devices, platforms and the silicon wars

One of the highlights of the Open Mobile Summit every year is our future of devices keynote panel, and this year will be no exception. We'll be bringing the heads of the world's leading handset and consumer electronics companies to the stage for a fast forward on the next 12-18 months of device evolution.

Plus, find out who's winning the silicon wars where the PC meets the Phone, and what advanced capabilities will be enabled by the next generation of chips.

Roadmaps for the open mobile web: Are we nearly there yet?

Is mobile web ready for prime time? Find out how html 5 and new browser technology is enabling a near native experience for lots of apps. What does this mean for publishers and what will it take to make the mobile web a reality?

Monetising Mobile

Monetisation is so fundamental to the Open Mobile Summit agenda it hardly seems necessary to mention it. But this year our Keynote panel addresses 'Monetising Mobile' as everyone – from major players to high growth start-ups – shifts focus from growth to monetization. From the collective industry challenge of attracting the big brand \$\$ to mobile – through to individuals tactics to monetize apps and services such as how to leverage game mechanics to shift from free to premium, the evolution of the subscription market, and virtual goods and currency trading.

Who owns mobile voice and data?

Expect mobile VoIP to make a big showing this year – we'll also be looking at the relationship between mobile networks, public and domestic WiFi and mifi / tethering – to understand exactly who "connects everything" in the multi-device, hyper mobile future.

Location, social and the content in the cloud

Who you know and where you've been have emerged as two major control points in the mobile Internet. Here operators battle players like Facebook and Foursquare for a role in discovery, referral and recommendation. We'll explore the major service opportunities in the personal cloud, the revenue potential, and who's best placed to deliver them.

Appcelerate: From killer app to killer business

Meet the leaders of the mobile app economy! Alongside the Keynotes this year we'll also be featuring App Idols – CEOs of the hottest app businesses on the planet – who'll be sharing the secrets to their success and their thoughts on the evolving landscape. Do you have what it takes to survive the app shakedown, and how can you build, market and monetize your way to a killer app business? Find out from today's market leaders – the real heroes of the global mobile scene.

Comment: Changing mobile - what's next?

Here at Open Mobile Media, we've been tracking the changing competitive landscape in converging mobile, Internet and media since 2008. Since then the industry has witnessed dramatic changes. As we come out of the Mobile World Congress, and look forwards, to identify the key battlegrounds for the 2011 event series, I have to say I don't believe we've seen the end of these seismic shifts...

Take the platform / device wars

Since 2008 Apple has wholly dominated the mobile Internet. But this year at the Mobile World Congress Android was the dominant force. Remember, 2 years ago Symbian was everywhere and appeared to be unassailable. Only HTC had launched an Android Phone. This year, Android visibly dominated the entire show, with a visual presence on almost all of the major handset manufacturers stands. Symbian and Limo have almost disappeared from sight.

Can anything stop the Android juggernaut? Possibly, if history is anything to go by. Nokia and Microsoft are clearly going to give it a good go. And whilst MeeGo took a hit from that same partnership announcement, Intel claims it remains committed to the platform. Meanwhile the operator's WAC initiative showed concrete development – and had a growing presence on partner OEM stands.

So many people have commented on the Nokia / Microsoft alliance I'm going to spare you my analysis. Rather I invite you to put your questions to Nokia's CEO, Stephen Elop, in person at The Open Mobile Summit in June. And, for the future of platforms, we'll be exploring the possibilities in the Keynote Panel: Future of Device and Platform Wars on June 9th, moderated by CCS Insight's Ben Wood, featuring the leaders of today's leading handset manufacturers.

See who's winning and who's set to stage a comeback in the smartphone race, explore who stands a chance in the tablet market, and whether fully open platforms or content-device ecosystems are going to win in the long run.

App vs the web?

Apple of course continue to lead in the app stakes, with by far the largest app ecosystem. Indeed, the controlled app ecosystem is the dominant model for packaging and distributing content / services in mobile today. But that too may change, given time.

Html 5 is around the corner, and an increasing number of companies – from operators to publishers - are betting on the open mobile web as the future service delivery platform.

If we can only crack the business model for content / services in an open web environment, the balance of power could shift again, away from Apple, and even perhaps Android, to yet more open platforms. Witness Eric Schmidt's comment in Barcelona that Android had enabled the java community to develop to mobile, but Chrome has the potential mobilize the world's web developers.

The battle to monetise mobile today has so many layers. In the app store world, Android monetisation is a serious chink in Google's armour, and this year Amazon will enter the fray with their own marketplace on Android. Amazon might stand a real chance of taking on Apple in the app store game. Meanwhile we're watching to see if publishers will allow Apple to re-define subscription models or vote with their feet – which could give other tablet manufacturers a chance to grab key content deals.

Beyond this, a whole host of companies, (including Open Mobile Summit sponsors Boku) look to enable operator billing, to create a ubiquitous, platform-independent mechanism for charging for apps and services – that – along with an uptick in mobile advertising could ultimately release content from islands of apps into a fully viral, mobile Internet environment.

Eventually these new billing mechanisms could spill out from virtual goods and digital goods through to real world transactions – meeting the mobile wallet / contactless revolution head on. We'll explore this deeper in "Roadmaps for the Open Mobile Web: Are we nearly there yet?", "Monetising Content and Apps", " Mobile Advertising" and "Opening the mobile wallet" at The Open Mobile Summit June 8-9, London.

San Francisco 2011 – NEW DATES – NOV 1-4

The Open Mobile Summit San Francisco, and Appcelerate, 2011 will take place November 1-4 (not November 8-10 as originally planned). Please update your calendar's accordingly.

We're working on the all important Keynote line-up for San Francisco now and should have some major announcements shortly. Watch this space!

Sponsorship update

Millennial Media, the largest independent mobile advertising network joins us this month as a Silver sponsor of both The Open Mobile Summit London and San Francisco 2011. I'm also excited to welcome Boku – one of the hottest mobile payments companies out of Silicon valley – who will be joining us as a sponsor in both London and San Francisco this year.

They join **Vlingo, ON, Google, Openwave, Umber** and **Texas Instruments** as 2011 sponsors – more to be confirmed shortly!

That's all for now. See you next month

Robin

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The Open Mobile Summit '11 London - June 8-9
The Open Mobile Summit '11 SF - Nov 1-4
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