

The original LBS event, now in its 13th year!

Groundbreaking
new
case studies!



MOBILE LOCATION SERVICES 09

12th and 13th May 2009,
London

Making LBS a mass market reality



Dan Mårtensson
Head Of Telematics
M2M & Wholesales
Telenor Sweden



Francois Bastelica
LBS Product Manager
Orange Group France



Alberto Nicoletti
VP Sales and Marketing
Genasys Spain



Richard Lee CEO
Creativity Software
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Product Manager
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02 Ireland Ireland



Sergio Cozzolino
VP TOP Clients and ICT
Market Innovation
Telecom Italia Italy



Martin Wilson
Managing Director
Indigo102 UK



Oren Nissim CEO
Telmap Israel



Andrew Scott
Founder and CEO
Rumble UK



Filip Linhart, Business
Development Manager
Telematics, Telefonica 02
Czech Republic

- **Hear** about real-life operator case studies of successful LBS
- **Discover** innovation in positioning technology
- **Learn** how A-GPS-enabled the market will become in 2009
- **Understand** which developer/operator partnerships are delivering real commercial success
- **Be part of** the debate on paid vs ad-funded LBS
- **Find out** how to leverage social networking trends with LBS
- **Evaluate** how convergence is changing the market
- **Determine** how to drive ARPU with new applications
- **Negotiate** the minefield of privacy issues
- **Optimise** your strategic industry collaborations
- **Meet** future business partners across the ecosystem, from across the globe

Pre-conference workshop 11 May 2009
Driving Revenue with Location Based Services

Led by: Creativity Software Ltd

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What's New This Year?

New! Comprehensively updated agenda with new senior speakers covering the latest and future trends

New! MLS has evolved – now featuring more 'real world' case studies and demonstrable trends than before, from those most active in the industry

New! Insight from the Open Mobile Alliance and the new Open Location Alliance, giving a worldwide view on global challenges facing the industry

Welcome back to Mobile Location Services, the original LBS conference now in its 13th year.

2008 was a significant year for the LBS industry, with major acquisitions putting location services firmly at the centre of operator and handset manufacturer strategy. The growth of data-centric handsets has pushed location-based applications into the mainstream, with increasing prevalence of GPS-enabled handsets and wi-fi, Bluetooth and cell-ID-based applications. An assisted-GPS-enabled marketplace looks to be a reality for 2009.

Mobile Location Services 2009 will give you the insight and contacts you need to share the success of this growing industry.

Hear from key operators and top developers about successful commercial deployment and new and proven innovations. Discover trends in search and discovery, mapping and navigation, device and application convergence and location-based social networking. Find out how LBS is being optimised for the enterprise, how business models such as ad-funded LBS are evolving and ROI is being achieved in emerging as well as advanced markets. Understand the issues overcome with SUPL standardisation and increased interoperability, and how user experience and product marketing is enabling LBS adoption. Hear what top-level legal minds think about privacy concerns and how partnerships across the value chain can be optimised.

With major operator case studies and a real-world picture of the challenges, successes and opportunities for LBS now, this really is the LBS event you can't afford to miss.

We look forward to seeing you in London!

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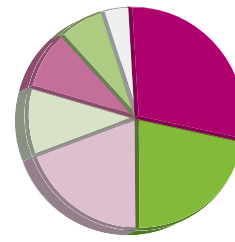
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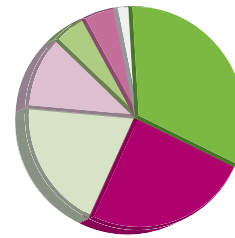
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Who Will You Meet?



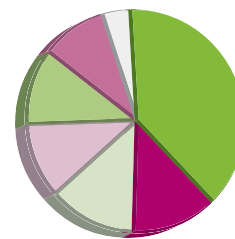
Value Chain Representation

Operators	19%
LBS software and applications	29%
LBS Infrastructure	22%
Wireless network infrastructure vendors	9%
Handset Manufacturers	7%
Advertising Agencies	4%
Other	10%



Global Attendees

Western Europe	33%
UK	25%
US	19%
Eastern Europe	11%
Asia	5%
Middle East	5%
ROW	2%



High-Level Attendees

President/ CEO/ Founder/ VP/ MD	13%
Product Director/ Manager	38%
Business Development & Marketing	13%
Consultants/ Analyst	11%
Engineering	11%
Product Manager	10%
Sales	4%

Source: MLS 08

Networking Tool

Maximise Your Time at Mobile Location Services with our **New! Online Networking and Meeting System**

As a pre-registered delegate of Mobile Location Services you will be automatically registered for Informa's online networking tool.



This secure system allows you to:

- Access the conference attendee list two weeks before the event, during the event and up to three months after.
- Interact with other participants online, send messages and set up meetings at the conference - all in a secure dedicated and private environment.
- Inform other participants of your work and interests by uploading your profile

Ensure you register early enough to take full advantage of this valuable networking tool!

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Richard Bragg

Tel.: +44 (0) 20 701 75658 Email: richard.bragg@informa.com

Day One – 12th May 2009

08.30 **Registration and Morning Coffee**

09.00 **Welcome and Speed Networking**



09.10 **Chair's Opening Remarks:**
Andy Walker, Managing Director, **Geomolo**, UK

Current State of the LBS Market

09.15 **Backdrop and Outlook**

- Growth of data service usage with increasing prevalence of data-centric handsets
- Anticipated growth with acquisition of technology and content by big players
- Analysing the effect of the economic downturn: will shipment limits impede the LBS market
- Analysing 'real world' data to forecast the near-term future of LBS

Jamie Moss, Senior Research Analyst,
Informa Telecoms & Media, UK

09.45 **Operator Case Study: Vodafone**

- Leveraging location with mobile web
- Accelerating evolution of geo-aware applications
- Navigation with Find & Go

Vaseem Ahmed, Head of Portal and Location Based Services,
Vodafone Internet Services, **Vodafone Group**, UK

10.15 **Operator Strategy: Using Location to Add Day-to-Day Value**

- Realtime traffic LBS based on floating car data
- The current situation in the Czech Republic: actual traffic information and different sources
- O2 pilot projects and varied customer demands: media and state administration
- Future outline for Czech Republic LBS

Filip Linhart, Manager of Business Development - Telematics,
Telefonica O2 Czech Republic, Czech Republic

11.15 **Operator Viewpoint: Turkcell LBS case studies**

- Criteria for selecting LBS application developers
- Criteria for a successful location based service
- Issues faced in selecting and deploying LBS
- Progression in establishing a critical mass of subscribers

Mustafa Eren, Business Development Manager, **Turkcell**, Turkey

10.45 Refreshments and Networking Break

What's In Place for Actual Growth?

11.45 **Positioning Technologies: Is the LBS Market Primed?**

- A-GPS, Bluetooth, Wi-Fi, WiMax, UWB: Combining technologies and integrated chipsets
- How A-GPS attach rates will match that of Bluetooth
- Timeline: availability of new solutions, chip launch forecasts and average selling prices
- Strategies for handset manufacturer partnerships

Senior Representative, **Qualcomm**, US

12.15 **PANEL DISCUSSION**
Evaluating Successful Deployment of LBS Services and Optimisation of Operator Partnerships: Developer Panel

- Rolling out a successful application: how to meet operator and user demands
- Assessing issues encountered
- Reviewing subscriber adoption by volume and use level: what trends

Alberto Nicoletti, VP Sales and Marketing, **Genasys**, Spain
Tasso Roumeliotis, Founder and CEO, **Wavemarket**

12.45 Lunch

What Services? Search, Discovery, Navigation, Convergence

14.00 **Search and Discovery LBS: Improving Search Results and User Loyalty with 'Best of Breed' Content Aggregation**

- Enhanced search and POI discovery with rich, user-relevant, timely results
- Monetising product with aggregator management
- Usage patterns and trends: how do we exploit what they tell us about mobile search users?
- Channels to market: on-portal vs preloaded LBS on handset

Steve Page, CEO, **Mobile Commerce**, UK

14.30 **Device and Application Convergence in the LBS Ecosystem: Will Navigation Always Be in Front?**

- Personal Navigation Devices and the mobile consumer market: will devices converge or co-exist?
- Combining applications to meet actual need: UGC, friend finding, mobile search and navigation in a holistic LBS
- Emerging devices: LBS as a core function, not a feature

Francois Bastelica, LBS Product Manager, **Orange Group**, France

What Services? Social Networking and Community

15.00 **Leveraging 'Community' in Location-Based Social Networking**

- Moving from mobile social networking to location-specific social networking: exploiting the fact that everything 'social' is location-based
- Harnessing the value of 'trust networks' in mobile search and discovery: UGC, 'peer reviewed' content
- Strategies to achieving critical mass in UGC to deliver genuine value: mashups and contribution incentivisation
- Privacy Issues

Ric Ferraro, Managing Director, **Geome Communications**, Spain

15.30 Refreshments and Networking Break

16.00 **PANEL DISCUSSION**
How Far will LBS Become Core to Mobile Living?

- Analysing the potential addressable market
- Market segmentation and global trends
- What limitations on pricing services when technology is fragmented: weighing up the challenge to meet expectations cost-effectively

Henry Erskine Crum, Co-CEO, **Spoonfed**, UK
Francois Bastelica, LBS Product Manager, **Orange Group**, France

LBS for the Enterprise

16.30 **Optimising LBS for Enterprise Application**

- Improving efficiency with fleet management, private and public sector (emergency workers): what evidence for actual monetary and resource benefit
- Improving lone worker security and safety
- Innovation in healthcare applications
- Harmonisation of working practices across markets

Ian Curran, Head of M2M/Telematics, Business Strategy and Product Development, **O2**, UK

17.00 **Operator Case Study: Telematics and M2M Applications**

- Effective deployment of M2M solutions to non-telecoms sectors
- Establishing E-call services for the E112 Directive
- Addressing different industries for global rollout (Global Sim, one Sim, eSim)
- Learning from partnerships with automotive manufacturers

Dan Mårtensson, Head Of Telematics/M2M & Wholesales,
Telenor, Sweden

17.30 **Chair's Summary**

17.45 **Close of Day One**

Day Two – 13th May 2009

08.30 **Registration and Morning Coffee**

09.00 **Welcome and Speed Networking**



09.10 **Chair's Opening Remarks**

How to Drive ROI in LBS

09.15 **Operator Pricing Strategy: How Can Perceived Value Be Charged?**

OPERATOR

- Can flat rate tariffs combine with premium rate LBS?
 - User perception of free vs one-off payment vs subscription: weighing up the legacy of PND pricing vs the iPhone app store
 - Identifying, leveraging and exploiting the true value of mobile in LBS
 - Differentiating the operator role as mobile 'ISP'
- Nick Geoghegan**, Product Manager, Data Solutions, **O2 Ireland**, Ireland

09.45 **How Can Advertising Fund - and Create - LBS?**

- Lessons learnt from directory strategy: monetising search content based on presence, prioritisation and performance
 - Using ad-funded mobile search to deliver contextually relevant information
 - Disguising - and making - advertising a genuine value-add for end users: coupons, price comparison etc
 - Negotiating opt-in - how can we understand and use user profiles?
 - Proximity marketing
- Martin Wilson**, Founder **Indigo 102**, UK, Former Head of Mobile, **Yell.com**

10.15 **What Will the LBS Revenue Model Become?**

OPERATOR

- Are subscription based services a dead end?
 - Are bundling and advertising-subsidised services the only way forward?
 - How revenue projections will be affected
 - Do 'users' with bundled LBS really use them?
 - Operator added value in a new business model paradigm
- Sergio Cozzolino**, Vice President, TOP Clients and ICT Market Innovation, **Telecom Italia**, Italy

10.45 Refreshments and Networking Break

Exploiting Revenue Opportunities Across the Value Chain

11.15 **Increasing ARPU with LBS in Growth Markets: Central America Case Study**

OPERATOR

- Identifying market potential for specific LBS despite restrictive network infrastructure and low penetration of high-cost handsets
 - Delivering a LBS at reduced cost: leveraging SS7 and SMS for a non-GPS-reliant user base
 - Analysing user demand in low-income markets and capitalising on the viral potential of community-based LBS
 - Driving ARPU in 2009
- Richard Lee**, CEO, **Creativity Software**, UK
Marvin Par, GM, **Claro (America Movil Group)**, Central America

11.45 **PANEL DISCUSSION**

Who Will Be the Eventual LBS Provider?

- What potential revenue sharing agreements could there be between the carriers and handset manufacturers?
 - What will be the business model for LBS in the immediate future (next 12-18 months)?
 - How do different players synergise their traditionally different business models for profitable LBS?
- Sergio Cozzolino**, Vice President, TOP Clients and ICT Market Innovation, **Telecom Italia**, Italy
Ric Ferraro, Managing Director, **Geome Communications**, Spain
Andre Malm, Senior Analyst, **Berg Insight**, Sweden

12.15 **Navigating Commercially Beneficial Relationships Across the Value Chain**

- Developing strategic partnerships to achieve global commercial deployment
 - Open APIs: Understanding the benefits of third party innovation
 - Leveraging the winning location-based application: search, locate, go
- Oren Nissim**, CEO, **Telmap**, Israel

12.45 Lunch

Simplifying the End-to-End LBS Experience

14.00 **Open Mobile Alliance: Current Work and Pipeline for Location Based Services**

- Current Aims and Objectives of the OMA's LOC Initiatives
 - Assessing the Functions and Performance of Currently Deployed Services
 - Overview of the OMA Location Working Group Pipeline
- Senior Representative, OMA**

14.30 **Seamless Pan-European LBS: The Open Location Alliance**

- Open Location Alliance strategy
 - Opening of location data across European markets
 - Monetisation of LBS a reality?
- Steve Page**, CEO, **Mobile Commerce**, UK with partners from MECOMO, Germany, Visibilly, Sweden and Deveryware, France

15.00 **Driving Adoption with Effective User Experience**

- Optimising UI and usability: minimising latency, inaccuracy and irrelevancy to minimise early user disillusion
 - Customer impact and direct customer experience insight
 - Integration with desktop for seamless mobile experience
- For updates go to www.mobilelocationserviceevent.com**

15.30 **Refreshments and Networking Break**

16.00 **LBS Marketing: Educating End Users**

- Harnessing the strength of the GPS 'brand' perception in LBS
 - Who should drive LBS marketing to achieve sufficient consumer awareness?
- Krister Svartsjo**, LBS Marketing Manager, **Ericsson**, Sweden

Overcoming the Barriers to MLS Success

16.30 **PANEL DISCUSSION**

Operator-initiated LBS: Is Being One Step Ahead of the User a Step Too Far?

- 'Pushed' vs 'Pull' mechanism LBS - analysing the value of predicting the need for knowledge (and understanding a user can't know what they don't know)
- Anticipating the needs of the end user based on location and explicit preference
- Balancing issues of invasion of privacy with highly tailored and valuable services - How to benefit advertisers, aggregators and end users

Andrew Scott, CEO, **Rumble**, UK

Simon Davis, CEO, **Mobgeo**, UK

Wilson Kerr, Founder and Principal Consultant, **LBS Strategy**, US

17.00 **Privacy Concerns vs Service Benefits: Is Privacy Actually an Issue?**

- Mobile phones as tracking devices to determine dynamic data patterns for valuable LBS: where is the line drawn?
 - Privacy safeguards: Is using encryption techniques to protect data transmission sufficient?
 - Public awareness and opt-in functionality
- Jan Willem van den Bos**, Senior Associate, **Denton Wilde Sapte**, UK

17.30 **Chair's Summary**

17.40 **Close of Conference**

'Current and future strategies are conveyed and responded to at this much needed conference, I look forward to this each year' JK @ MLS 07

Pre-conference workshop Monday 11 May 2009 Driving Revenue with Location Based Services

Led by: Creativity Software Ltd

Overview

Location Based Services is an application area experiencing exponential growth. If you are a mobile network operator, it brings you a unique opportunity to deliver innovative services to your customer base, whether consumers, residential, SME or large enterprises. If you are a manufacturer of mobile devices, you need to differentiate yourself from your competitors to increase market share and retain customers. Or, if you are an Internet Service Provider, a telecom service provider or provide other types of services to a large number of customers (consumers, residential, SMEs or corporates) Creativity Software can help you to location-enable some of your existing services and bring new revenue-generating, value-added services to market.

12.30 **Registration**

13.00 **Introduction**

Revenue: Potential of Location Based Services as a VAS revenue generator

14.00 Coffee

Case Study 1: Vehicle tracking/fleet management in Middle East (SMS & GPRS; GPS & Cell-id): High value/high price enterprise service

Case Study 2: Family Finder – Central America (SMS; Cell-id); Speed to market, high consumer subscription based on SMS marketing

Hands on revenue, cost & profit forecasting based on single VAS service Deployment

16.05 Coffee

Refining the model – Multiple VAS service deployment

Q&A

17.30 Close

Workshop Leaders

Creativity Software is a privately-held company specialising in Location Based Services. With offices in the UK and China, and distributors in Latin America, the Middle East and India, it is a trusted partner of mobile network operators, mobile device manufacturers, service providers and large enterprises from around the world, and supply a variety of white label location based solutions. Customers include TfL, Rough Guides, Samsung, Motorola, Pearson, BP and America Movil.

Creativity Software was one of the first companies in the world to deploy a commercial LBS: Find Your Child. It served on the Steering Committee of the UK Code of Practice for Location Based Services, in conjunction with the Home Office, the Association of Chief Police Officers, the UK Mobile Operators and Children's Charities.

Richard Lee, CEO, Creativity Software

Richard started his professional career with IBM in 1985, working with the company in UK and Australia. Having returned to UK to become Business Development Director with international publisher Reed Elsevier, he then moved back to Sydney to run their Australian business unit. He later moved to IIR to become Regional Director for Asia Pacific and Middle East. In 2001 Richard set up Creativity Software.

Saul Olivares, Market Development Director, Creativity Software

Saul started his professional career in Mexico in 1994, where he worked for Mitel, a manufacturer of IP communications equipment and for Avantel, the MCI WorldCom brand. After studying in Canada, Saul came to England to work for DataKinetics, which was later acquired by Intel, where he worked for 5 years. After that he was Director of Sales and Marketing for a value added distributor of converged communications solutions for the Middle East and North Africa region. In 2006 Saul became Market Development Director for Creativity Software.



Mobile Content and Services (7th edition) Market Outlook, Revenue Opportunities and Business Models

Key questions answered in this report:

- ✓ How should mobile operators and others in the value chain evolve to stay competitive and benefit from new market opportunities?
- ✓ What is their market potential in terms of end users and revenue generation?
- ✓ What are the emerging technologies and solutions to drive the mobile content and services industry?

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London, venue to be confirmed

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