



**Chetan Sharma**

Greetings,

The global mobile industry has made phenomenal strides in the past 15 years yet best is still to come. The mobile ecosystem has become much more dynamic, lightening fast paced, and breathtakingly unpredictable. The evolution of mobile services is impacted by several key forces of change. These include technology innovation and diffusion, consumer behavior, globalization, and easing of the regulations to promote trade and commerce. This is leading to the emergence of new players and new ecosystem dynamics, as well as the creation of open architectures.

In 1991, Mark Weiser, in his seminal article, "[The Computer of the Twenty First Century](#)," described computing as "a world in which humans and computers were seamlessly united." The article opened with "*The most profound technologies are those that disappear. They weave themselves into the fabric of everyday life until they are indistinguishable from it.*" If we look forward to the next 10 years of evolution in the mobile industry, two things are certain.

First, over this decade, mobile will become so ingrained and embedded in our daily lives that, as Weiser suggested, it will be indistinguishable from the mundane. Second, the very definition of a mobile device and mobility will undergo a drastic transformation over the next decade. Instead of just mobile phones having cellular radios and connectivity, there will be hundreds and thousands of different devices, each a unique appliance, which will have wireless connectivity to the network. There will be sensors in the buildings we live in, the clothes we wear, the roadways we commute on, and the vehicles we drive in. Almost everything of substance will have connectivity. With the evolution in networking technologies, middleware architectures, and mobile devices, we are entering a new era of always-on, real-time access mobile experiences.

We are putting together an exciting Executive Summit - [Mobile Future Forward](#) to bring together thought leaders who are some of the most influential minds in the mobile industry and are shaping the ecosystem evolution. These experts and visionaries from around the globe will discuss the mobile industry 5 years forward, envision what the user experience and the use case scenarios look like, discuss and debate the challenges and opportunities in the journey to that vision.

This paper describes various themes for the conference through a series of pictures that try to capture the essence, the complexity, the opportunity, and the debate within each of the micro trends. At the Mobile Future Forward conference, these will be the topic areas of our conversation with some of the best minds in the industry.

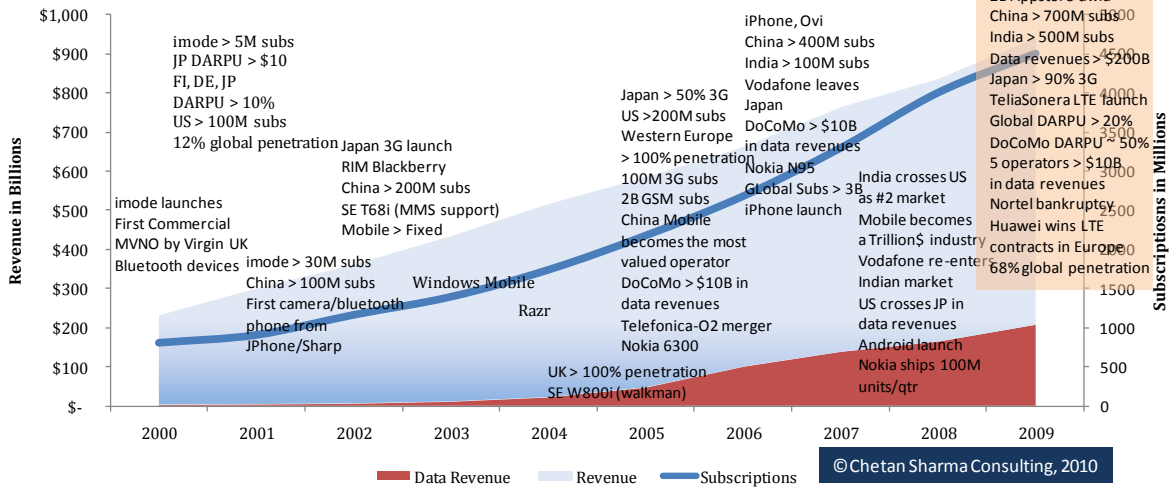
We would love to hear your feedback on what matters to you the most and your suggestions on how we can make the program better. We look forward to seeing you at the event.

Thanks

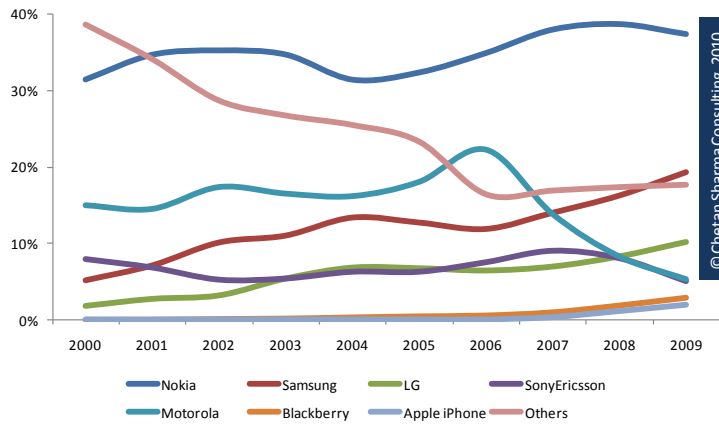
Chetan Sharma  
Chief Curator - Mobile Future Forward

# The Last 10 years

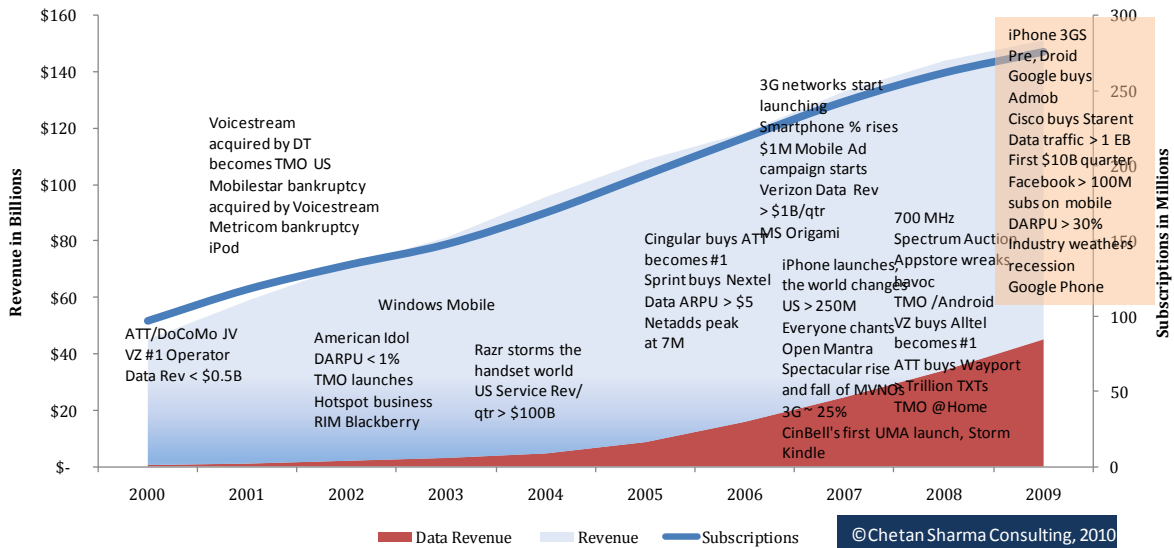
## Global Mobile Industry: The Last Decade



## Global Handset Marketshare Over the Last Decade



## US Mobile Industry: The Last Decade

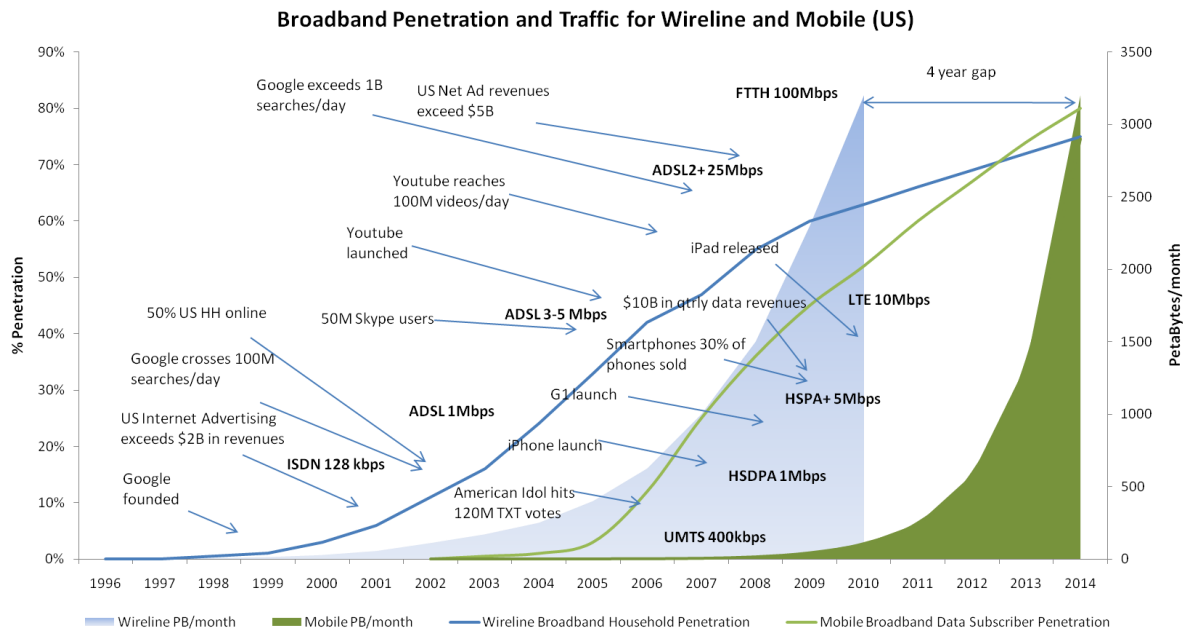


# The Next 10 years: Trends that matter

## 1. Mobile ecosystem is getting complex



## 2. Network evolution: more capacity, more bandwidth, tremendous usage

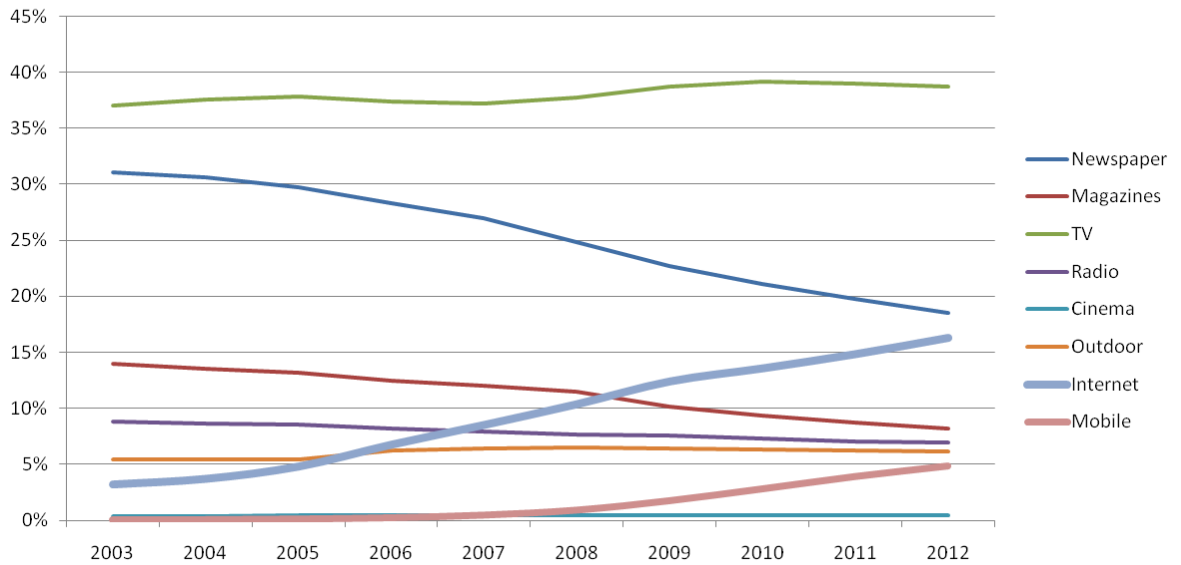


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<sup>1</sup> Source: Adapted from T-Mobile USA

3. New sources of revenue: mobile advertising, commerce, and services

**Global Advertising Spend Share Reallocation**



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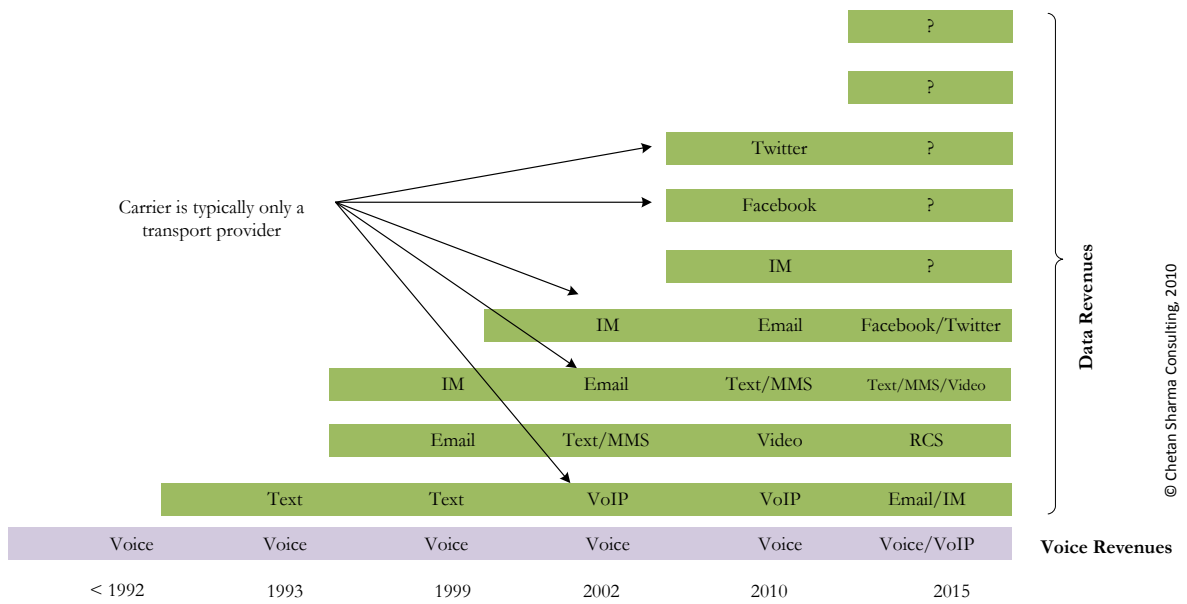
4. Evolution of content, media, entertainment, and commerce



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<sup>2</sup> Source: Microsoft Home, Perceptive Pixel, Intel

5. Evolution of communication



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6. Always on Real-Time Access - mobile cloud computing & instant access to anything



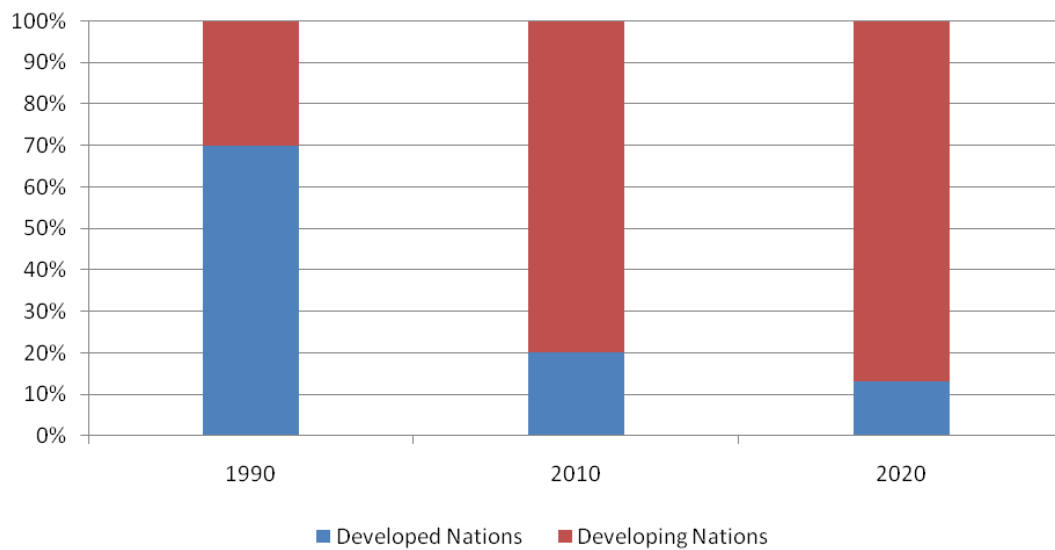
7. Internet of things: mobile device as a remote of our lives



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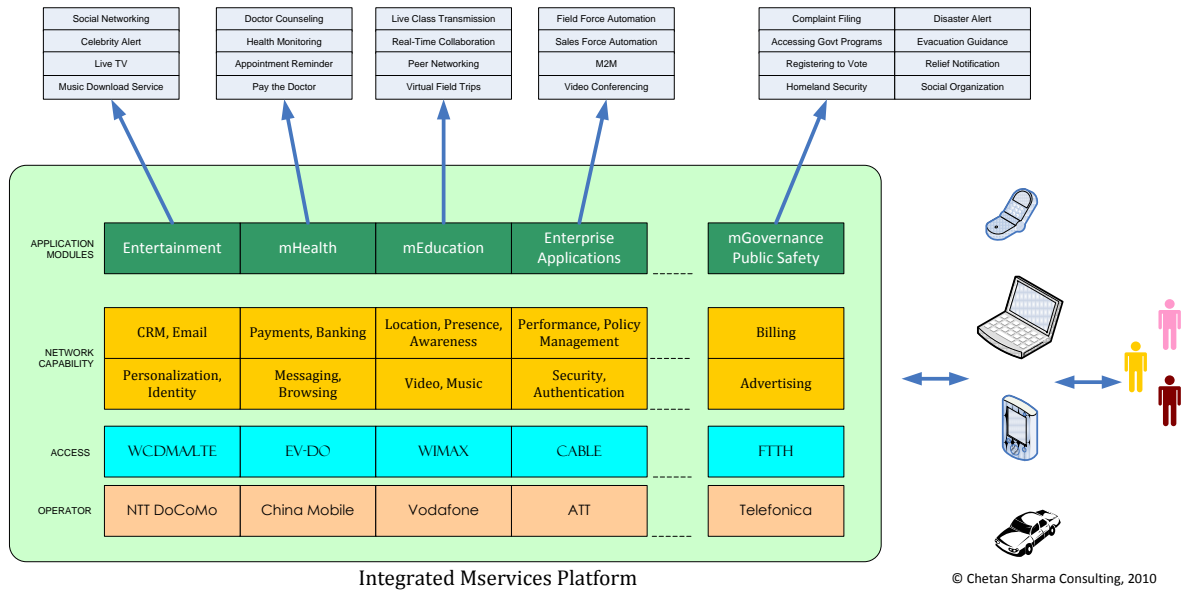
8. The world is flat - globalization and competition

Mobile Subscription Distribution

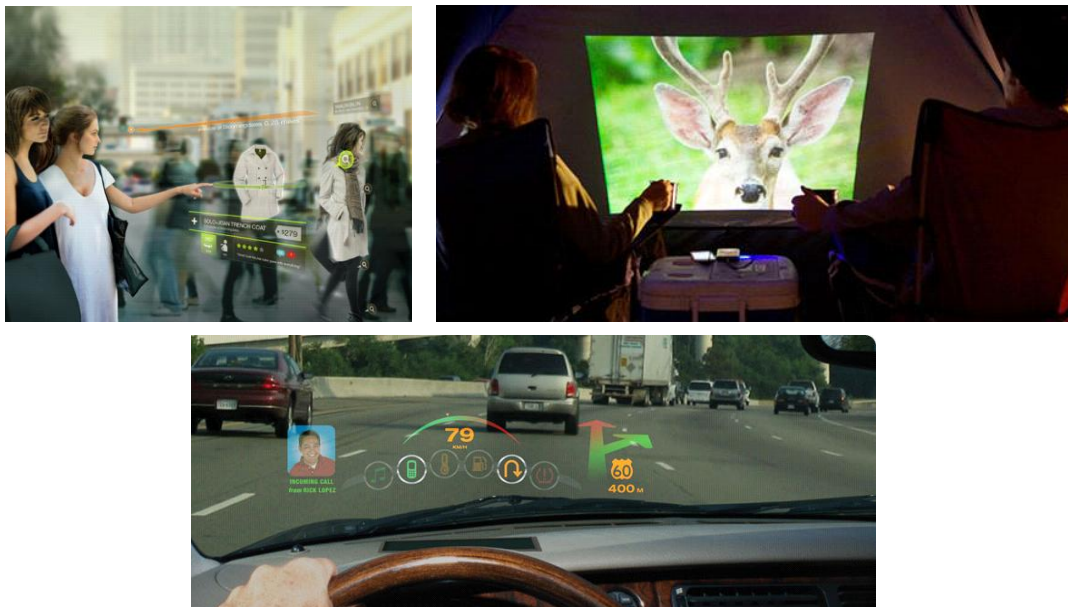


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### 9. Mobile as a platform - let a thousand industries bloom



### 10. New Experiences - display, interaction and commerce

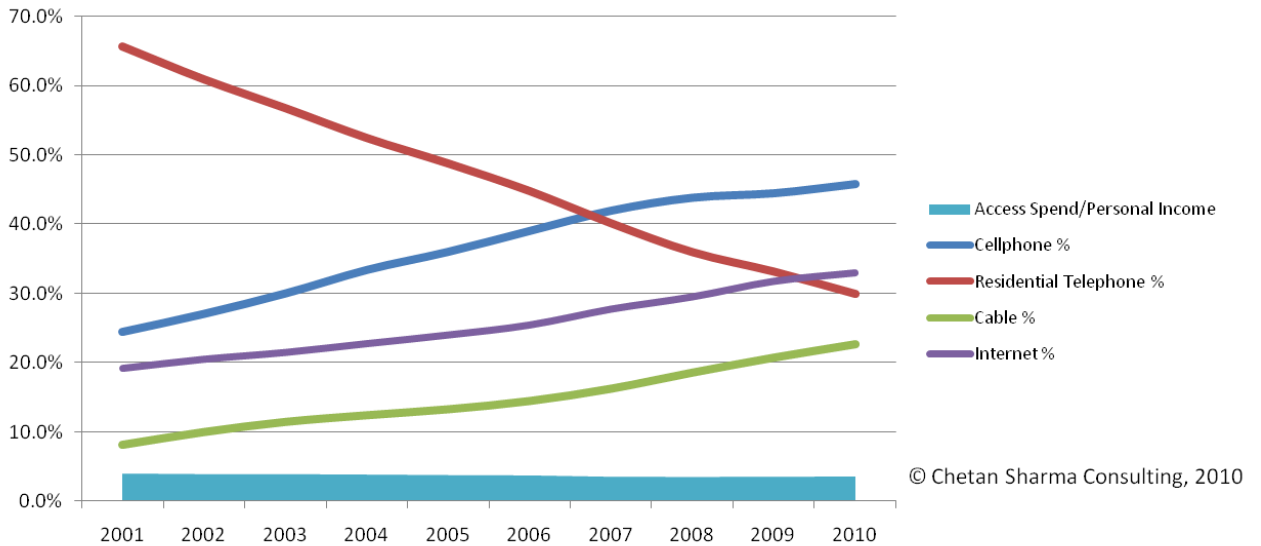


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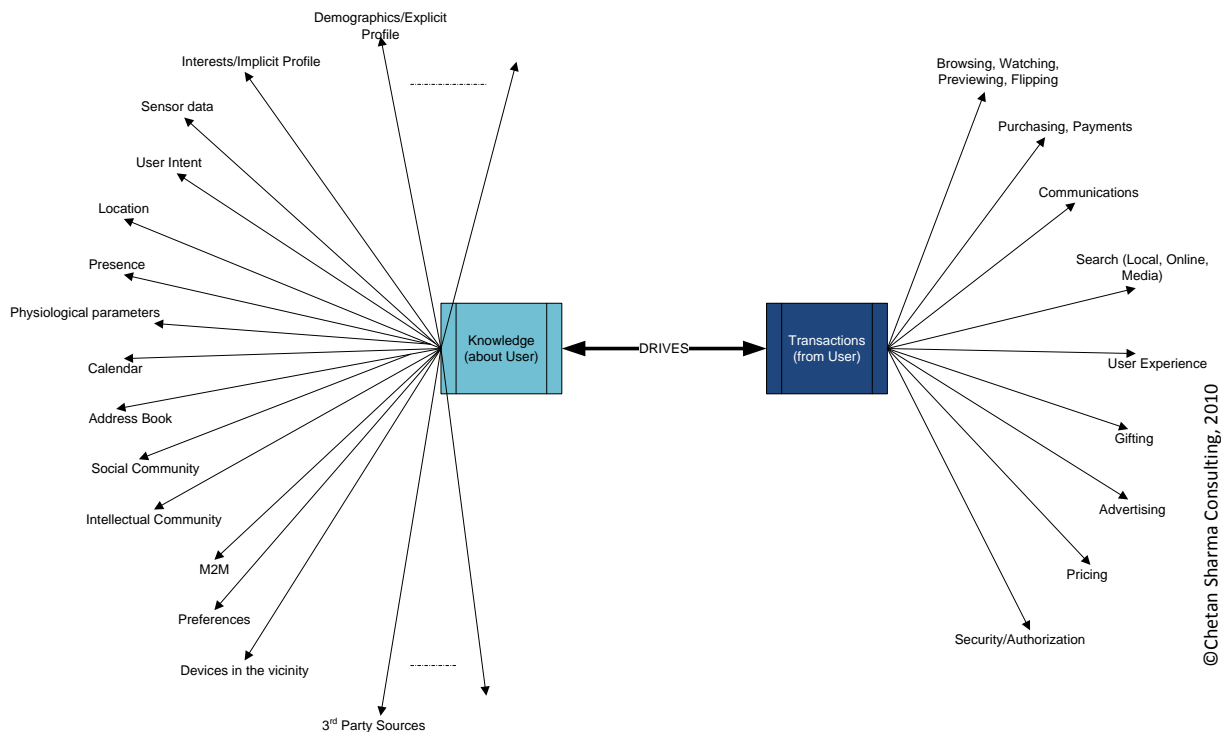
<sup>3</sup> Source: Fjord, Microvision

11. Reallocation of revenues - winners and losers are decided in reallocation

**Reallocation of Consumer Spending (US):  
Telephone+Cable+Internet+CellPhone**

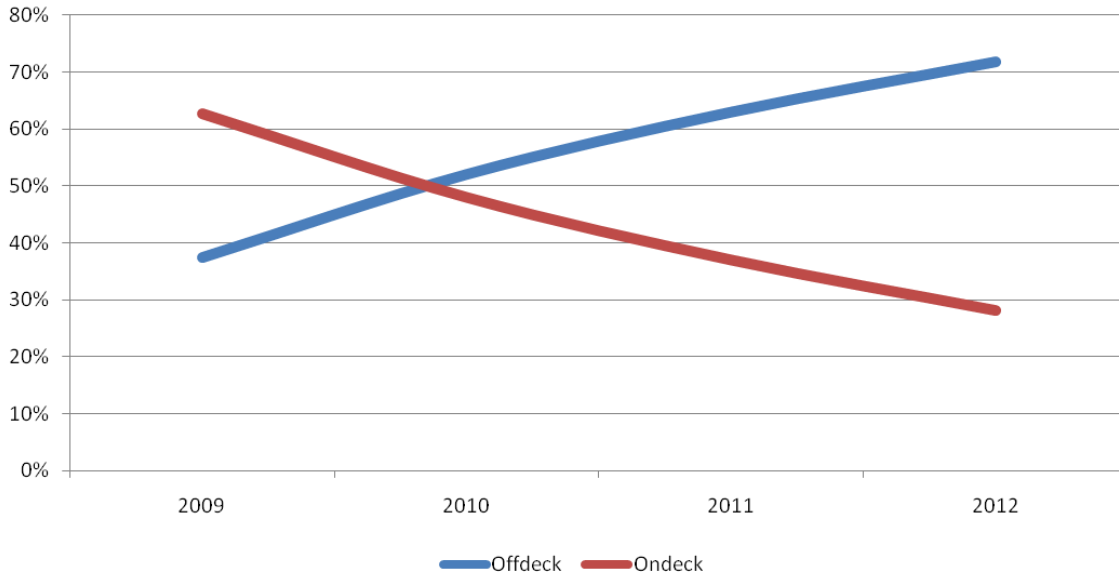


12. Battle for the analytical mind - data, context and intelligence drives everything



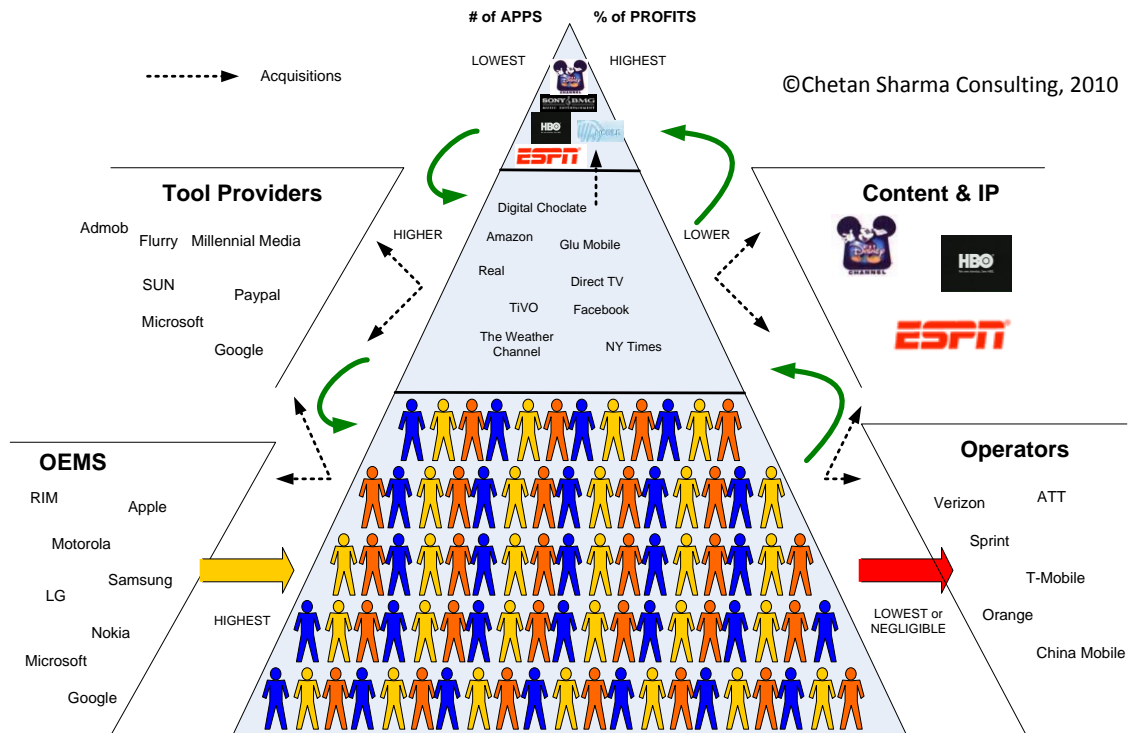
13. Shifts in ecosystem - the ups and downs, and shifts of revenue sand dunes

**Change of Guard: Offdeck takes over Ondeck revenues**



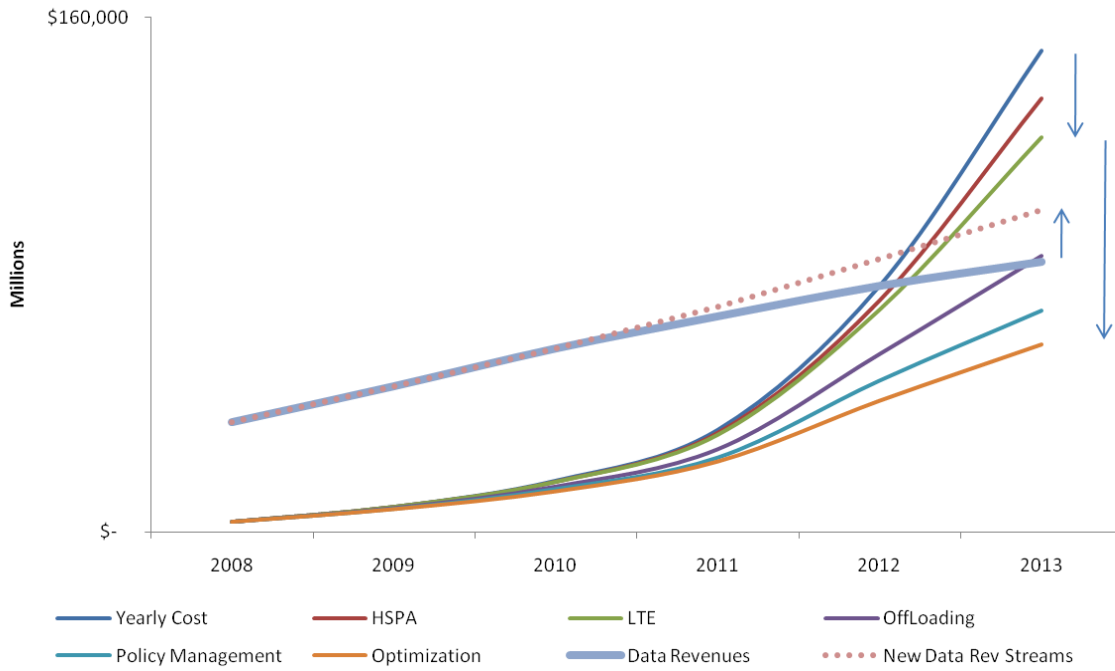
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14. Nurturing ecosystems - aggregating the developers and partners



15. Managing the network - what doesn't kill you makes you stronger

Increase in Margins w/ various solutions (US)



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## Partial List of Thought Leaders attending the Summit

- **Glenn Lurie**, President, AT&T
- **Stephen David**, Former CIO, Proctor & Gamble
- **Subba Rao**, CEO, TataDoCoMo
- **Anand Chandrasekhar**, SVP & GM, Intel
- **Christopher Dean**, Chief Strategy Officer, Skype
- **Hank Skorny**, SVP, Media Mobile Cloud Computing, Real Networks
- **Louis Gump**, VP Mobile, CNN,
- **Paul Palmieri**, Founder and CEO, Millennial Media
- **Dr. Sailesh Chutani**, CEO, Mobisante
- **Abhi Ingle**, VP, AT&T
- **Ken Denman**, CEO, Openwave
- **Mike Sievert**, Chief Commercial Officer, Clearwire
- **Amir Mashkooori**, CEO, Kovio
- **Dr. Genevieve Bell**, Intel Fellow & Director, User Experience, Intel
- **Jon Stross**, VP & GM - Babycenter, Johnson & Johnson
- **Dr. Suzanne Clough**, Chief Medical Officer, WellDoc
- **Dr. Boris Nikolic**, Sr. Program Officer, Global Health & Discovery, Bill & Melinda Gates Foundation
- **Dr. Greg Brandenburg**, CEO, Columbia Basin Health Association
- **Krishna Vedati**, SVP & GM - Mobile, AT&T Interactive
- **Takayuki Hoshuyama**, COO D2 Communications
- **Neville Ray**, SVP, T-Mobile
- **David Weiden**, General Partner, Khosla Ventures
- **Russ McGuire**, VP, Sprint Nextel
- **Wim Sweldens**, President, Alcatel-Lucent
- **Rob Glaser**, Chairman, Real Networks
- **Jack Kennedy**, EVP, News Corp

## About Mobile Future Forward Conference

Mobile Future Forward is produced by Chetan Sharma Consulting.



### About Chetan Sharma Consulting

Chetan Sharma Consulting is one of the leading management consulting and strategic advisory firm in the mobile industry. We are focused on evolving trends, emerging challenges and opportunities, new business models and technology advances that will take our mobile communications industry to the next level. Our expertise is in developing innovation-driven product and IP strategy. Our clients range from small startups with disruptive ideas to multinational conglomerates looking for an edge. We assist major brands formulate winning, profitable, and sustainable strategies.

Please visit us at [www.chetansharma.com](http://www.chetansharma.com)