



Pacific Northwest Wireless Summit
Vancouver, Canada 2008

Ideas. Innovation. Investment

What do you get when you put 40 of the top minds in the wireless industry together in one of the best meeting rooms in Canada?

- Compelling insights into our industry's issues and opportunities?
- A road map to the future of wireless?
- A call to action – a manifesto?
- A check-list of what's hot and what's not in wireless?

2008 Pacific Northwest Wireless Summit Leadership Summit Report

www.pnwsummit.com

January 16, 2008

2010 Commerce Centre (BC Olympic and Paralympic Winter Games Secretariat)

Produced by: Wireless Innovation Network of BC (WINBC)

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The 2008 Leadership Summit

(A reconstruction of the Summit in 5 short sections)

"Great things are poised to happen here. We're going to be examining the current state of our local wireless cluster, how we fit in regionally and around the globe, where we're headed and how we're going to get there."

- Robert Forget, Chair, WINBC

If your actions inspire others to dream more, learn more, do more and become more, you are a leader.

- John Quincy Adams

The goals for this first-ever Leadership Summit were lofty ones: to identify the key issues the Pacific Northwest wireless cluster must address to become a sustainable centre of excellence; to create a road map our wireless companies could use to guide them to world-class performance and success.

The Summit took place in the high tech meeting rooms of the 2010 Commerce Centre in Vancouver, BC. One of goals, while in that setting, was to find out how to leverage the 2010 Olympic and Paralympic Winter Games to develop contacts and new business around the world.

We sent invitations to 46 top leaders of wireless companies and related organizations; 40 accepted, an exceptionally high rate of participation in any voluntary event. There was excitement in the air and a palpable sense of optimism that carried right through the day from the opening welcome, to the closing remarks from the Hon. Colin Hansen, BC's Minister of Economic Development.

The day had five parts, which we've reconstructed here in abbreviated form to give you a feeling for how the day went, as well as the sense of the discussions. Those parts were:

1. Opening Remarks
2. Creating the Right Environment for Innovation
3. Attracting and Keeping World-Class Talent
4. Accelerating Commercialization
5. Gaining Access to World Markets

Note: Our aim here is to give you a feeling for how the Leadership Summit went and to give you highlights from our discussions. To do that, we've taken a few liberties with the dialogue. The order of some comments, and their attributions, may have been changed in the interests of getting at the essence of what was said.





Pacific Northwest Wireless Summit



Session 1

Opening Remarks

Participants

WINBC Chair & Executive Director	Robert Forget, Chair, WINBC Michael Bidu, Executive Director, WINBC
2010 Olympic Opportunity	Brian Krieger, Director, 2010 Commerce Centre
2007 BC Wireless Industry Survey	Steve Thomson, President, Thomson & Associates
Wireless in Alberta	Arnie Stephens, Executive Director, WiTec
Wireless in Washington State	Joe Verschueren, Co-Founder & CEO, Formotus

Robert: Welcome all to our first Leadership Summit. Great things are poised to happen here. We're going to be examining the current state of our local wireless cluster, how we fit in regionally and around the globe, where we're headed and how we're going to get there. I'm excited about this first Leadership Summit and look forward to the day's work.

Michael: That neatly sums up the mission and the vision of this Leadership Summit. We're going to particularly look at how to make this wireless region one of sustainable excellence, recognized around the world. But before we do, let me introduce you to several people who have some things to say that have a bearing on our future: Brian Krieger, Director of the 2010 Business Centre, whose hospitality we are enjoying; Steve Thomson, who carried out the 2007 BC Wireless Industry Survey; Arnie Stephens, Director of Wireless In Alberta, and Joe Verschueren, CEO of Formotus and very knowledgeable about the wireless cluster in Washington State.

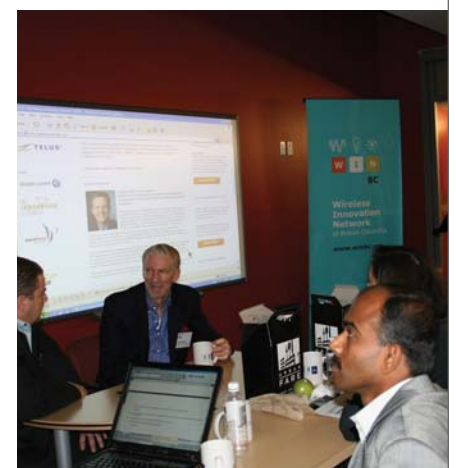
Brian: The 2010 Business Centre exists to bring you opportunities. Let this be your showcase, from now right through the Games. BC Companies who want to be suppliers of wireless related products and services can find business matches here.

We also invite you to the BC-Canada Pavilion in Beijing, site of the 2008 Olympiad. In particular, we invite you to the wireless product showcase which opens the Pavilion this coming May.

Michael: What we do in May '08 – the contacts we make, the business we initiate – may help our wireless companies enter a market of more than 500 million wireless subscribers. Now let's hear from Steve, his snapshot of the BC wireless industry.

“What we do in May '08 – the contacts we make, the business we initiate – may help our wireless companies enter a market of more than 500 million wireless subscribers.”

-Michael Bidu, Executive Director, WINBC





Session 1

Opening Remarks, cont'd

"Help our local companies 'own the podium' when it comes to export markets."

- Michael Bidu, Executive Director, WINBC

"BC is at the inflection point, 'the heel of the hockey stick'."

- Steve Thomson, Thomson & Associates

"Management is doing things right; leadership is doing the right things."

- Peter F. Drucker

Steve: It's a good snapshot...a good news story. BC is at the inflection point, "the heel of the hockey stick." Revenues are growing faster than headcount – over \$1 billion (excluding carriers) – and there are now 250 active wireless companies...250 more involved to some degree, with more than 6,000 employees. Exports have increased, and companies are getting older and more mature, supporting a broad set of technologies and applications. More than 50% of emerging companies are cash flow positive. Growth capital is still much needed, but in the larger scheme, we have a significant, diversified and stable wireless cluster, with bullish prospects – growth rates of 300% predicted over the next couple of years.

Arnie: Alberta also has strength, arising mainly from our wireless industry's focus on the oil and gas industry. We have 300 wireless and wireless-related companies – 60 as members of WiTec Alberta. Our greatest needs are experienced leaders in wireless marketing and sales, and for greater commercialization of research.

Joe: In Washington State we also have strong industry, bolstered by their business ties to the the four dominant wireless carriers: Verizon, AT&T, Sprint and T-Mobile.

Michael: There are several action items to take away:

1. Exploit the unique opportunities to build our international profile through the powerful Olympics brand, both the 2008 Beijing Olympics and, through the 2010 Business Centre, the 2010 Winter Olympics. There is a \$4 billion procurement opportunity, if we're sharp enough to seize it.
2. Help our local companies "own the podium" when it comes to export markets.
3. Communicate our good news to our industry, to government and to the public in a more effective and efficient way.
4. Help companies gain easier, faster access to growth and expansion capital.
5. Promote better collaboration between the wireless sectors in Alberta, BC and Washington State...and the rest of the world.



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Session 2

Creating the Right Environment for Innovation

Participants

- Presenter: Soren Harbel, VP Innovation Development, BC Innovation Council
- Moderator: Judy Bishop, Managing Partner, Bishop & Company
- Panelists: Bill Tam, CEO, EQO Communications
Terry Hughes, CEO, Redwood Technologies
Olivier Vincent, President & CEO, Canpages
Mike Zaks, Technology Advisor, NRC/IRAP
Several delegates

Soren: Innovation comes from talented minds and one way to find them is to grow your own. Encourage the young to enter science, math and engineering. Bring science and business students more closely into one another's spheres. Cross-pollination is the thing. Let us start by creating an asset map for wireless here, as others have done in other high tech sectors. And let us commercialize our products faster. The greater the volume we create, the more interest we draw, and then the money comes. Above all, learn what you need to succeed in international markets. That's where our future lies.

Moderator: Innovate. Innovate. BC Companies must become more innovative. How do we do that? Look to Silicon Valley, which has the edge on filtering ideas. How are we like them already. How do we differ? Why are we so good at creating intellectual property, but so slow to take to the next and higher stages?

Sue Hakima: Look to the model of the Ontario Centres of Excellence, now unified as one centre with up to \$500,000 of funding for emerging tech companies.

Mike: To be more innovative, we must attract more talent from outside the region. But outside companies tend to act, or not to act, because of fear. "What happens if I fail?" We need more successful anchor tenants, of the Sierra Wireless class. We also need access to more funds. Answer the question: "How do I get more capital to expand globally?"

Moderator: Is that not more a question of environment, not innovation?

Bill: We need a critical mass of companies.

Olivier: We need more greed.

"We need a critical mass of companies."

- Bill Tam, CEO, EQO Communications

"A silly idea in Silicon Valley may get funded, while a great idea in Calgary may not."

Terry Hughes, CEO, Redwood Technologies



"To be more innovative, we must attract more talent from outside the region."

- Mike Zaks, Technology Advisor, NRC/IRAP





Session 2

Creating the Right Environment for Innovation, cont'd

"A tsunami of ideas is about to hit...But we are asleep."

- Judy Bishop, Managing Partner,
Bishop & Company

Nothing can stop the man with the right mental attitude from achieving his goal; nothing on earth can help the man with the wrong mental attitude.

- Thomas Jefferson

- Terry:** A silly idea in Silicon Valley may get funded, while a great idea in Calgary may not. We need a more sophisticated level of entrepreneur...more canny investors.
- Moderator:** It's clear to me: A tsunami of ideas is about to hit the OECD countries, coming from China, Asia, India. But we are asleep... unaware of this giant wave. We should not resist the tsunami, we should swim with it. I also believe it is indeed, a matter of greed. It is hunger for change that is creating this tsunami potential. We need greater drive ourselves. A stronger work ethic. We need to be more focused.
- Terry:** Investors are often driven by patents, but paranoia about patents may be limiting innovation.
- Moderator:** We are in a crisis, and a crisis is a terrible thing to waste. We need to wake up to different international cultural attitudes.
- Audience:** Our North American market focus limits our innovation. We get a product, focus on commercializing it and innovation goes out the window. In Asia, innovation tends to be continuous.
- Caroline:** We have to work to change the culture of innovation.
- Moderator:** The culture of innovation is changed by incremental steps. We could be Silicon Valley – we need to improve the monetization of our intellectual property. We need to understand our flaws, and remedy them now.
- Olivier:** The only way I can attract innovators is with stock options!
- Mike:** Maybe we need to help smaller companies link up with partners. If you help someone else succeed, you will succeed. Collaboration helps to create innovation.



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Session 2

Creating the Right Environment for Innovation, cont'd

Michael: Excellent comments! I would say that if ideas can change the world, then the role of innovation is to make sure they are changes for the better. There is a tremendous greed, a hunger, for positive change among the people in Eastern Europe, Latin America and the Asia Pacific. They want better lives and are working hard to get them and there really is a tsunami of ideas, as Judy Bishop so aptly said, coming from them. It's clear what their motivation is to make things better. But we already have the good life, so what's our motivation?

Let's all agree on some action items:

1. Engage with the BC Innovation Council to create asset maps for different subsets within the wireless sector.
2. Create a mechanism to help bring together entrepreneurs and the university research community.
3. Understand the strengths and weaknesses of the Ontario Centres of Excellence, explore best practices in the world and create a BC version.
4. Look for ways the wireless community can support changes that will improve the culture of innovation.

"Innovation comes from talented minds and one way to find them is to grow your own."

- Soren Harbel, VP Innovation Development, BC Innovation Council

"But we already have the good life, so what's our motivation?"

- Michael Bidu, Executive Director, WINBC



"We have to work to change the culture of innovation."

- Caroline Lewko, Founder & CEO, WIP Connector





Session 3

Attracting and Keeping World-Class Talent

Participants

Presenter	Pat Watson, VP HR, Sierra Wireless
Moderator	Pat Watson, VP HR, Sierra Wireless
Panelists	Jeff von Ende, VP Sales, Alcatel-Lucent Peter Howley, Chairman, Success Growth Systems Alfredo Tan, Senior Director, Yahoo! Mobile Erin Hirsch, Director Business Programs, SFU Segal Business School

"We also have to recognize that the employment market has changed. We have a global talent pool now, and that's to Canada's benefit more than to the US because our immigration rules and policies are easier to deal with."

- Pat Watson, VP HR, Sierra Wireless

"Talent is cheaper than table salt. What separates the talented individual from the successful one is a lot of hard work."

- Stephen King, Author

Pat: Finding people is a universal problem. What seems to work is starting with the 'steak' -- the money and benefits package -- to attract talent, then laying on the 'sizzle' to keep them. By sizzle, I mean making them feel part of a team...making them feel their contribution to the team is crucial. We also have to recognize that the employment market has changed. We have a global talent pool now, and that's to Canada's benefit more than to the US because our immigration rules and policies are easier to deal with.

Another thing we have to change is our relationships with universities, colleges and technical institutes. We need to collaborate with them on recruiting, and we should probably learn to make better use of Facebook, YouTube and other social networking sites.

Finally, we have to know our own metrics. How long do people stay with you? How do promotions affect that? Have you asked employees why they leave...and why they stay? What you learn from those questions may surprise you.

Peter: Doing good in the community is powerful. It's a way of setting an example from the top. I also think you should not undersell the 'sizzle' of living in Vancouver, because it is such a wonderful place to live.

Alfredo: I agree with Pat on steak and sizzle. Money is just table stakes. In Silicon Valley, they sell you on the sizzle of mentors, and of being around smart people on an exciting team.



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Session 3

Attracting and Keeping World-Class Talent, cont'd

- Jeff:** People want to follow a strong leader. They have to have trust in your senior management.
- Erin:** The number one reason for moving is opportunity for growth and US companies do a better job of subsidizing education.
- Pat:** Alumni and employee referrals are a tremendous source of new employees.
- Peter:** Recruits, at a senior level, also need to know that they will build useful contacts and that they will have an exit strategy. "Line of site" is critical to employees. Do they feel engaged? Can they walk in to talk to the president?
- Michael:** Again, we've heard some great ideas.

Now let's set our action items:

1. Learn how to operate in the "global talent pool" and to use online social networks to do some of our recruiting.
2. Collaborate better with universities, colleges and technical institutes.
3. Encourage more young people to enter science and engineering.
4. Encourage cross-fertilization between technical and business people.
5. Poll our own employees to find out why they stay and why they leave.

"The number one reason for moving is opportunity for growth, and US companies do a better job of subsidizing education."

- Erin Hirsch, Director Business Programs, SFU Segal Business School



"People want to follow a strong leader. They have to have trust in your senior management."

- Jeff von Ende, VP Sales, Alcatel-Lucent





Session 4 Accelerating Commercialization

Participants

- Presenter: Jim Maynard, President, Wavefront
- Moderator: Caroline Lewko, CEO, Wireless Industry Partnership (WIP Connector)
- Panelists: Parm Sandhu, Director Network Services, Telus
Lisa Shields, CTO, hyperWallet Systems
Jim Maynard, President, Wavefront

“Our goal is to reduce development costs and time to market for new mobile products and services, which will improve the ability of B.C. companies to grow and prosper in national and international markets.”

- Caroline Lewko, Founder & CEO, WIP Connector

“The ability to convert ideas to things is the secret to outward success.”

- Henry Ward Beecher

Jim: Wavefront partners with industry leaders to accelerate commercialization by leveraging existing expertise and capabilities. We are the bridge between the wireless developer community in BC and the mobile operators, government and large enterprises that are deploying new wireless products and services. Wavefront helps provide developers with neutral, independent test services and with the market knowledge they need for rapid commercialization.

Caroline: How do we get our product to market faster? Companies now expect to do it in four months, whereas the reality is it's taking more like two years. This is no longer a marathon, it's a sprint. Silicon Valley is very good at sprinting. We asked how we can compete if we can't be Silicon Valley, and the answer we came up with was Wavefront. Our goal is to reduce development costs and time to market for new mobile products and services, which will improve the ability of B.C. companies to grow and prosper in national and international markets.

Lisa: We started out by making our hyperWallet product multicurrency from day one. But then we started our marketing in Canada. If we had gone international with confidence earlier, we would be a more successful company now.

Parm: We're a testing facility, and when I see a product, it is often not ready for market, and I have to make a tremendous investment to make it successful. But I don't have those kind of resources, so even when I think a product might be successful, there are internal financial limitations. Another problem with many companies is their inability to scale to cover the market.





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Session 4

Accelerating Commercialization, cont'd

Caroline: We hear Canadian telcos say: "We are happy to be fast followers."

Sue Hakima: What do carriers think about 'Android' and other open source initiatives? These tools may change the paradigm carriers are operating under. On the web, an application might only have customers for three months. Carriers today are not able to move to that fast a cycle. But when the carriers finally become 'disintermediated', applications will move to a web-like life cycle. We need to make it easier to generate 'mashups' that allow products to be launched and monetized quickly.

Michael: Here are some action items to consider:

1. Make use of the technology and expertise of Wavefront to accelerate the commercialization of our innovations.
2. Direct our attention beyond Canadian telcos.
3. Keep an eye on Android and other open source initiatives.
4. Be prepared for a faster web-like life cycle for our products.

"Wavefront partners with industry leaders to accelerate commercialization by leveraging existing expertise and capabilities."

- Jim Maynard, President, Wavefront



"If we had gone international...we would be a more successful company now."

- Lisa Shields, CTO, hyperWallet Systems





Session 5

Gaining Access to World Markets

Participants

Presenter	Teri Nizzola, Industry Analyst (ITC & Wireless), EDC
Moderator	Asokan Thiyagarajan, Technology Evangelist, Motorola
Panelists	Robert Forget, Director Wireless Sales, Vecima Networks Joe Verschuere, CEO, Formotus Teri Nizzola, Industry Analyst (ITC & Wireless), EDC

“We believe match-making events are the best way of introducing Canadian companies to overseas customers. They were done sporadically in the past, but will become more frequent.”

- Teri Nizzola, Industry Analyst, Export Development Canada

“What you get by achieving your goals is not as important as what you become by achieving your goals.”

- Zig Ziglar

Michael: I invited Teri to make a presentation at our Leadership Summit because I'd like our WINBC members to explore international opportunities in China, India, Latin America and elsewhere. Teri is going to tell you about a successful case study with Sprint/Nextel on the east coast that I think we can replicate on this coast.

Teri: At the EDC, we encounter a number of common challenges from companies wanting to expand into international markets, among them:

- How can I access immediate working capital to cover the upfront costs of an export contract?
- How can I protect my company from the risks of non-payment?
- My new customers are demanding performance guarantees.
- My new customer wants to buy from me, but can't finance the purchase.

To answer those challenges, let me simply tell you that EDC can help you access capital by providing a guarantee to your bank. We offer accounts receivable insurance. We guarantee bonds and we will even provide financing to your foreign buyer.

EDC has reengineered itself to focus on sectors, including ICT, to support your initiatives to market globally. Besides the services I've already described, we also include match-making with foreign customers, plus intimate knowledge of foreign markets and on-the-ground staff in over 100 countries.



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Session 5

Gaining Access to World Markets, cont'd

- Teri:** Here's one at-home example: we recently loaned Sprint/Nextel a lot of money to buy Canadian technology and held a match-making event for 200 Canadian companies to meet with Sprint/Nextel. We are planning to replicate this process with a carrier in India, and all WINBC members will be invited.
- Joe:** We built our product on the Microsoft stack, so that it is localized wherever you find Microsoft.
- Teri:** We believe match-making events are the best way of introducing Canadian companies to overseas customers. They were done sporadically in the past, but will become more frequent.
- Robert:** Our target is not necessarily the large telcos. And one of our biggest issues is lead generation, which can only work by understanding the market.
- Teri:** We can provide some market intelligence based on our past experience with the potential customers.
- Audience:** Don't forget Industry Canada and their trade commissioners. We have received fantastic support. I promote it strongly within our sales organization. In fact, we are staying in the IC space at Barcelona.
- Robert:** They have provided us with end to end support, absolutely terrific.
- Asokan:** Cultural differences are key. For example, Indians will never say no.
- Robert:** In the hardware world, every market is unique.
- Joe:** Simpler products, and flexible products sell better.
- Caroline:** How do we deal with short product life cycles? You need longer term relationships.
- Robert:** You need to use local distribution channels.
- Audience:** You need to develop long term relationships with distributors and partners, and then market your new products through them.

"One of our biggest issues is lead generation, which can only work by understanding the market."

- Robert Forget, Director Wireless Sales, Vecima Networks

"Cultural differences are key."

- Asokan Thiyagarajan, Evangelist, Motorola



"You need to develop long term relationships with distributors and partners, and then market your new products through them."

- Audience





Closing Remarks

Hon. Colin Hansen, BC's minister of economic development, joined us for the second half of our panel discussion on "Access to Global Markets," and listened closely to our real challenges and needs, which he was able to address in his closing comments to our Leadership Summit.

In his comments, he congratulated our wireless cluster on its success and growth, and noted that the BC government strongly supports the continuing growth and development of BC wireless companies: "We're always looking for ways to take part."

He went on to remark that "High tech – including wireless – now employs more people in BC than in forestry, fishing and mining...combined. The wireless industry is very important to the future of our province."

He finished his talk by saying that since BC is Canada's gateway to the huge Asia-Pacific markets, BC wireless companies should be seeking to do more business in that region. One way to do that, is by using the marketing opportunities being presented by the 2008 Summer Olympics in Beijing, and the 2010 Winter Olympics here.

For his talk, the minister received a rating of 4.14 out of 5 in our survey. The audience felt he was relevant, had great listening skills, was personable during his speech and was approachable during our networking break.

"...high tech now employs more people in BC than in forestry, fishing and mining...combined. The wireless industry is very important to the future of our province."

- Hon. Colin Hansen, Minister of Economic Development and Minister responsible for the Asia-Pacific Initiative and the Olympics

"A mentor is someone who sees more talent and ability within you, than you see in yourself, and helps bring it out of you."

- Bob Proctor, Author and Speaker



Thank You

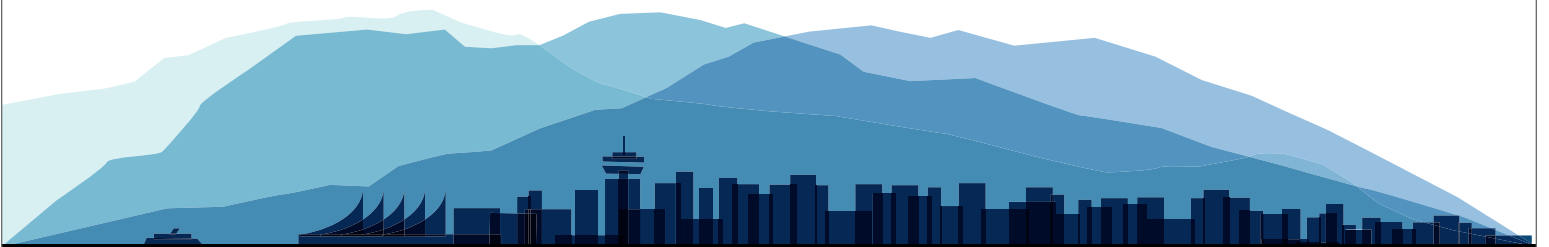
Thank you to our venue sponsor, Brian Krieger, Director, 2010 Olympic Committee; our Guest of Honor, Hon. Colin Hansen, Minister of Economic Development and Minister responsible for the Asia-Pacific Initiative and the Olympics; the WINBC Organizing Committee, Robert Forget (Chair), Peter Lesyk (Vice Chair), Bruce Tattrie (Secretary), Michael Bidu (Executive Director); and to our presenters, moderators, panelists, and participants. See you in 2009!

Alfredo Tan, Senior Director, Yahoo! Connected Life
Arnie Stephens, Executive Director, WiTec Alberta
Asokan Thiyagarajan, Technology Evangelist, Motorola
Bill Tam, CEO, EQO Communications
Bruce Tattrie, Partner, Fasken Martineau
Brian Roberts, GM Wireless Data Sales Western Canada, Bell
Caroline Lewko, Founder & CEO, WIP Connector
Cameron Fraser, CTO, WebTech Wireless
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Soren Harbel, VP Innovation Development, BC Innovation Council
Dr. Sue Abu-Hakima, Co-Founder & CEO, Amika Mobile
Teri Nizzola, ICT Sector Advisor, EDC
Terry Hughes, CEO, Redwood Technologies
Val Swannell, Managing Partner, Creekstone Consulting
Wayne Fredin, Vice President Sales, Vecima Networks

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About Pacific Northwest Wireless Summit

The Pacific Northwest Wireless Summit 2008 (PNWS 2008) three-day Summit is several events in one: It's a leadership summit meeting, a wireless conference and tradeshow, and a Service Provider Investment Forum (SPIF). The 2008 Summit focused on the four top wireless growth areas: social networks, location-based services, mobile advertising and mobile entertainment.

This event brings together technology and application innovators, service providers and other companies and stakeholders in the wireless industry from BC, the Yukon, Alberta, Alaska, Washington, Northern California and Idaho. The event is open to the global wireless industry and welcomes participation from Asia Pacific, Europe, Latin America, Africa, and the rest of the world.

www.pnwsummit.com

About WINBC

WIRELESS INNOVATION NETWORK of BRITISH COLUMBIA (WINBC) is promoting the fast growth and sustainability of British Columbia, Canada as one of the world's best wireless technology clusters and communities. We are the industry association representing more than 250 BC wireless technology companies generating in excess of \$1B in annual revenues. WINBC's objectives are to accelerate the immediate commercialization capability of member companies as well as build long term capacity for growth and innovation in BC's wireless cluster.

www.winbc.org

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