

ADVANCE PROGRAM

BUSINESS CONFERENCE

MAY 19 and 20, 2008 (Monday and Tuesday)

LOS ANGELES CONVENTION CENTER

LOS ANGELES, CALIFORNIA, U.S.A.

Business Conference Chair

Marko Slusarczuk, Optoelectronics Industry Development Association, Washington, DC,
U.S.A.

Monday, May 19 / 8:00 am – 5:00 pm / Room 515

8:00 am **Registration and Coffee**

8:45 am **Welcome** – Paul Drzaic, President, SID

8:50 am **Introduction** – Marko Slusarczuk, Business Conference Organizer, Opto Electronics Industry Development Association

9:00 am **Opening Address: OLED: From Hype to Business**, Gildas Sorin, CEO, Novaled AG

The recent introduction of the first AMOLED displays on the market bring the performances and design advantages of OLED to public notice. These first products reveal in fact that OLED's have reached a maturity level compatible with a real market start. A review of technical advances but also the business moves towards an established industry will be presented.

9:30 am **Global Display Market Dynamics and Perspective**, Kenny Kim, Executive VP, DisplayBank

The recent announcement of Sony's collaboration with Sharp facilitated the Taiwan LCD makers' willingness to partner with major TV brands. Accordingly, this presentation will focus on the choices that the Korean display companies like Samsung and LG Display face in the future; and more so on the attempts to answer the question: Who could be the leader of the AMOLED, post LCD industry?

10:00 am **Break**

10:30 am **Display Technology Forecasts for Wireless Applications**, Michael Lebbly, President Optoelectronics Industry Development Association

Wireless applications are one of the fast growing market segments for displays, but at the same time impose high demands on performance, robustness and power consumption. The talk will present market analyses of both application trends and competing technologies for these applications.

11:00 am **The TV Market and its Impact on the Display Business as Whole**, Paul Semenza, Vice President, Displays, iSuppli Corporation

This presentation will include an analysis of consumer preferences, an assessment of technology competition, highlight company strategies, and opportunities in the TV supply chain. The presentation will draw on several areas of iSuppli's research, including monthly consumer surveys with TV customers, research on the global TV market (including the US, Europe, Asia, and BRIC countries), research on LCD, PDP, and other display technologies, and tracking of display components, manufacturing, and technology developments.

11:30 am **More Behind the Glass**, Lisa Ferrero, Vice President and Deputy General Manager, Corning Display Technologies

In this presentation, we will discuss how Corning offers more behind the glass, applying our technology expertise and our long history of research and development to collaborate with customers on industry-advancing solutions to market needs. We will review the progress of recent innovations and discuss several emerging display technologies, including polysilicon and OLED, green lasers and silicon on glass.

12:00 pm **Welcome from Luncheon Sponsor**

Lisa Ferrero, Vice President and Deputy General Manager, Corning Display Technologies

12:05 pm **Lunch and Panel Discussion**

The morning's speakers will answer questions and elaborate on topics covered.

1:30 pm **Digital Signage**, Chris Connery, Vice President of the PC and Large Format Commercial Display Market Research Group, DisplaySearch, an NPD Company

DisplaySearch, will present market research data related to the rapidly growing area of large area displays used for signage.

2:00 pm **The Fast Track for LEDs into Large-Area LCDs – Leveraging Consumer Valuation of LED Features**, Steve Marsland, Managing Director of the McLaughlin Consulting Group

LED backlights can deliver improvements in color gamut, contrast, weight and thickness for LCD notebooks, monitors and TVs. But what will consumers pay for these improved features? Are the price premiums enough to pay the added costs? McLaughlin Consulting Group (MCG) has developed a methodology to forecast consumer adoption rates for LED-backlit LCDs based on both pricing and forecast technical performance improvements. Via this analysis the "fast track" for rapid LED adoption can be determined, and target markets and price points for fastest adoption identified.

2:30 pm **Reflective Displays: Enabling Mobile Devices of the Future**, Jim Cathey, VP of Business Development, Qualcomm MEMS Technologies, Inc.

This presentation will discuss how these displays of the future will allow consumers to enjoy the full range of applications that today's mobile devices have the potential to offer. The panel will also discuss barriers inhibiting

the adoption of reflective displays into the consumer market and methods to overcome them. Among these are metrics that represent display performance under actual viewing conditions and benchmarks that highlight handset performance increases due to increased energy efficiency.

3:00 pm

Break

3:30 pm

New Era Markets: The Bright Light in the Front Projector Display Business, *Dr. William Coggshall, President, Pacific Media Associates*

Flat panel displays get the headlines, but the big story is in the front projector market. While forecasts for traditional applications call for little growth, new applications promise to deliver dizzying growth rates. Many are drawn to these new markets, but a thorough understanding of the opportunities and technology roadmaps is essential for success.

4:00 pm

Patent and Intellectual Property Issues in Display Technology, *Song Jung, Partner and Head of IP Practice, McKenna, Long and Aldridge*

Intellectual Property laws are changing and becoming increasingly important in display manufacturing. This talk will address issues of the impending U.S. patent reform on the display business and steps companies can take to minimize risk.

4:30 pm

Panel Discussion

The afternoon's speakers will answer questions and elaborate on topics covered.

5:00 pm

Networking Reception

Tuesday, May 20/ 10:30 am – 2:00 pm / Room 515

10:30 am

Turning Solution Processed OLED Displays into Reality, *William Feehery, Global Business Director, DuPont*

Recent announcements by many companies have shown the market interest and technical possibilities for AMOLEDs, but the potential manufacturing cost advantages of AMOLED displays over AMLCDs has not yet been realized due to the high costs of manufacturing using current vapor-deposition methods. DuPont Displays is developing solution processing technology to address the manufacturing cost issues seen in the marketplace. By printing OLED displays instead of using vapor-deposition, we can reduce the use of high vacuum equipment and shadowmasks, and subsequently scale OLED manufacturing to a competitive motherglass size. DuPont Displays has demonstrated performance of solution OLED materials at similar levels to vapor deposition OLED materials. By using small molecule materials DuPont has been able to take advantage of many years of industry knowledge on how to make and purify OLED materials. Our materials breakthrough has been the development of a set of small molecule materials which have been tailored for printing and coating processes.

11:00 am

The Explosion of Touch, the Critical User Interface, *Malcolm Thompson, President MJT Associates*

Following the release of the i-phone, touch has become a very hot area in a wide range of products like cell phones, other consumer products, auto displays and computers. There are a wide range of technologies available, the relative attributes of all these technologies will be discussed; can any one technology dominate all applications?

11:30 am

Going Small AMLCDs, *Hong Choi, Chief Technology Officer, Kopin Corp.*

What are the technical objectives / challenges? If successful, what markets will you address? What are your entry points? What is the growth strategy? What can be applied to high pixel count larger form factor AMLCDs? Where do you see competition and how are you better?

12:00 pm

Panel Discussion

The morning's speakers will answer questions and elaborate on topics covered.

12:30 pm

Lunch/Panel Discussion – Investing in Display Technology: Perspectives on Industry and the Capital Markets

A panel of venture capitalists, investment bankers and research analysts share their views and take questions from the audience.