

## Capability overview

Analysys Mason's experience in the media sector



## Selected projects in the media sector [1/2]

<i>Project</i>	<i>Client</i>	<i>Description</i>
Advice on strategy for growth	Technology services division of a major European broadcaster	As part of this project we undertook a series of interviews with internal and external customers to provide the client with an objective assessment of its current capabilities. We developed detailed country-by-country projections for the addressable market in Europe and North America, across 14 customer segments and four service categories. We identified and assessed a number of organic and inorganic strategic options for our client, and provided recommendations on organisational structure, potential partnerships, and the sequence and timing of key strategic decisions.
Bid support for a spin-off organisation	Private equity buyer	We provided support for developing a bid for a spin-off of a diverse business consisting of broadcasting/mobile towers and media services. The project involved building a detailed independent business model which required an understanding of the key changes in the market including DTT switch-over, evolution of requirements for mobile towers. Based on our business model our client developed a valuation for the company.
Assessment of the market for new mobile services, including mobile content	Australian Broadcasting Authority	We supported the Australian Broadcasting Authority (ABA) in its efforts to better understand the market for new mobile services. The ABA aimed at acquiring a deeper insight into the availability of different types of adult content and potential options for managing access to eligible individuals. Analysys provided an overview of key developments in the European and Asian markets, including key regulatory initiatives.
Mobile TV standards	Dutch Ministry	We forecast the market for mobile TV in a Western European country, analysing user demand, emerging business models and the likely technologies that would be used to support such services. We undertook Small but Significant Non-Transitory Increase in Price (SSNIP) analyses to establish the 'market' for mobile TV, assess the potential for 'broadcast' solutions to be substituted by 'unicast' solutions and to support significant market power (SMP) analyses. The results of our study were used to support forecasts of competition in the market for mobile TV, and to determine the eligibility of the local incumbent operator for participation in a forthcoming spectrum auction, on the basis of competition requirements.

## Selected projects in the media sector [2/2]

<b>Project</b>	<b>Client</b>	<b>Description</b>
Broadband distribution strategy	Major European broadcaster	Provided support in the formulation of a broadband distribution strategy. We examined a range of online on-demand propositions, including both streaming and download-and-store features. As part of the work, we made forecasts of UK Internet usage trends for the next five years
Identification of growth potential and opportunities in the US wholesale communications market	Large European integrated operator	The project was structured around analysis of the retail and wholesale communications markets, with emphasis on demand and supply side trends. For the retail market analysis, a market size model was produced to estimate demand, by technology platform, for fixed and mobile services. We also looked at demand trends, in terms of emerging content services and retail operator activity. Outputs from the retail market model were then fed into the wholesale market model, which was developed further to estimate demand for wholesale products by region in the US market. To further support this analysis, we spoke to a number of wholesale communications product users to better understand what their requirements will be and how demand may change as a result of developing content-focused services in the USA. The outputs from the project have been a key input into the company's business development efforts in the US market.
Assessment of triple-play cable TV company	Private equity organisation	Assessed the potential and viability of a Western European cable TV company with a strategy of offering cable TV, interactive TV, telephony and broadband Internet access. We assessed the company's strategy and performed a detailed review of its infrastructure and upgrade plans, including a detailed model of the investments in the network.

## Selected reports on topics in the media sector

<b>Title</b>	<b>Description</b>
Opportunities for Non-traditional Players in Communications Markets	Value chains in voice, entertainment and media distribution markets are all undergoing transformation. As telecoms operators look to embellish their broadband offerings with value-added and content services, they are increasingly competing against non-traditional players such as Internet and consumer electronics brands. In turn, these players are encroaching on traditional telecoms territory with the launch of communications and entertainment services. This report assesses the opportunities for non-traditional players in communications markets and identifies potential weaknesses in the emerging portfolios of telecoms operators.
Telco TV: European market opportunities and operator strategies	With revenues from fixed telephony in decline and broadband retail prices eroded by increasing competition, Europe's fixed operators view IPTV as a potential answer to the revenue shortfall. However, in contrast to the homogeneous US market, the European market shows marked national and regional differences in broadband adoption and customer spend. This report examines local factors that determine the size of the opportunity for telecoms TV and discusses best operator strategies for addressing it.
Scenarios for the Evolution of the Wireless Industry in Europe to 2010 and Beyond	Describes three plausible scenarios for the evolution of the wireless industry in Europe over the next five to ten years. The scenarios present the potential consequences of fixed–mobile substitution, fixed–mobile convergence, emerging services and changes in the value chain. The report demonstrates how the wireless industry could evolve in very different ways and the diverse implications of this evolution.
Pushing Beyond the Limits of 3G with HSDPA and Other Enhancements	This report critiques the technologies available to operators for supporting new services, such as mobile TV and video, as the capabilities of 3G technology are pushed to the limit. This is accomplished by establishing the critical service choices and their technological requirements.
Making a Success of Mobile TV: 3G MBMS versus DVB–H, DMB and MediaFLO	Considers a range of mobile TV and video broadcasting technologies, including 3G MBMS, DVB–H, DMB and MediaFLO, as well as discussing the partnerships that may be needed to make a success of mobile TV and video. The report helps mobile operators and their partners to implement winning business models, defining the services offered, the best technology path and the right partners.

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