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1. Introduction to Kane

- A consultancy based in France, the UK and Belgium
- 25 years of experience in
 - comparative studies
 - organisational strategy
 - Information Technology
- An equally deep knowledge and understanding of TV and post-production.
- A highly developed methodology for organisational comparison, established in manufacturing and service industries with such references as Alcoa, Saint-Gobain, NATO, France Telecom, Saatchi & Saatchi, and Vivendi
- In Media and TV since 1992

Kane's Expertise

- Market Research
 - Reports and studies
 - Benchmarking
 - Market Sizing
- Consultancy
 - “Management methods supported by benchmarking.”
 - A new approach to strategic investment and above all to the choice and implementation of new technology.

Our focus

- All of our work is based on our own database, and on personal contacts and visits as well as desk research
- Qualitative as well as quantitative research
- Always interested in “why” and “how” as well as “what”
- Always seeking to draw comparisons based on our direct experience of broadcasters



The Kane Catalogue

- News 2005
- Media Asset Management 2005
- Broadcast Market Sizing 2005
 - Western Europe
 - Eastern Europe, Middle-East, Africa, South Asia
 - North America
 - Asia & Pacific (12 most important countries)
- HDTV 2005
- NRCS 2005
- Complementary Markets 2005
 - Sports (complete)
 - 9 others

2. Newsroom 2005: server-based newsrooms

- Technical architecture of 300 server based newsrooms
- Organisation workflow analysis of 90 of them (April 2005)



2. Newsroom 2005: server-based newsrooms

- Who uses what? NRCS, automation, editing, servers, browse, content management and mass storage, graphics
- Comparison of news solutions
- Identification of best practices
- Editorial innovations
- Comparison of integration methods (best of breed vs. “single supplier”)
- Workflow analysis: multiskilling, organisation changes (galleries, control rooms)
- Size of crews
- Job content evolution
- Return on investment and competitive advantages



3. MAM 2005: Digital Media Asset Management

- Analysis of video references among content management suppliers (Harris, Blue Order, Dalet, Omnibus, ...) and mass storage (Sony, Storagetek, ...).
- Visits to 40 applications in the world
- Identification of 24 categories of project and 18 functional areas
- Product comparison (120 features) of the 13 most important products: Harris Invenio and Arkemedia, Omnibus, Ibis, Siemens, Blue Order, Artesia, Ancept, Ardendo, Virage, Pro-Bel, Konan, Dalet
- "Best practice"
- Workflow analysis: indexing, rushes vs. final cut, etc.
- Job content evolution
- Return on investment and competitive advantage



4. Broadcast market sizing 2005

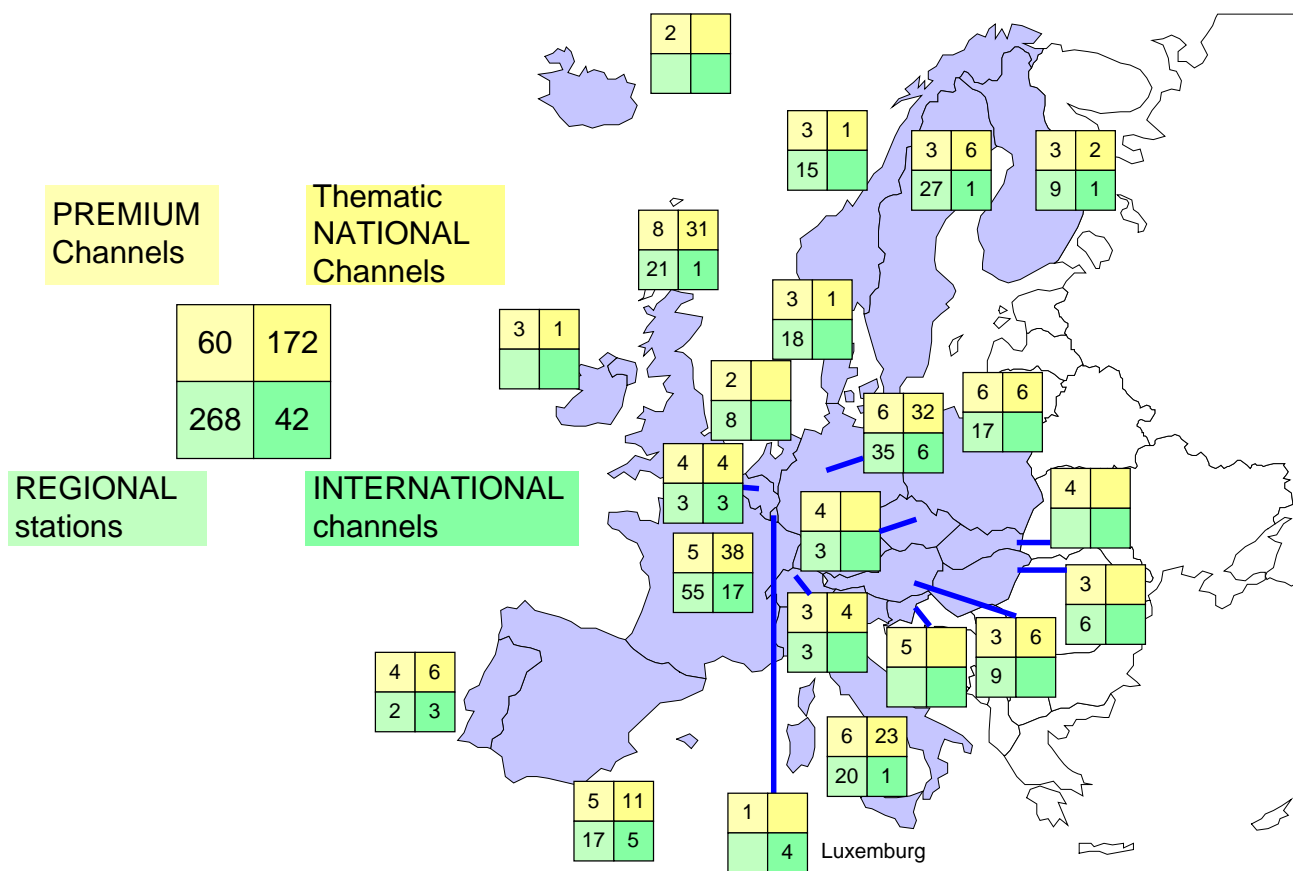
- SAN/server solutions for production (sport, features, news) as well as for playout, archiving, automation and content management
- 4 reports: a-Western Europe, b-Eastern Europe, Middle East, Africa, South Asia, c-North America, d-Asia-Pacific
- 3 years: 2005-2007
- Original segmentation (size/categories of project)
- Categories of channel (premium, national syndication, national independent, regional syndication, etc.).
- Based on an exact list of channels (several resource centres and regulatory authorities) and the situation in each country
- A mix of “estimate ratios” for small channels and real leads based on direct knowledge and contact with the most important channels
- Consistent with current installations and installed base
- Flexible criteria to meet specific vendor needs

4. Broadcast market sizing 2005

3891 total channels		Numbers of installations					
		How many global?	How many gone ?	How many remaining ?	# Opportunities	Amount remaining (m)	Amount opportunities (m)
	News (1.5m)						
	Sports (1m)						
600k ^	Payout (.8m)						
	Prog prod (400k)						
	Payout (300k)						
	News (150k)						
	Production (150k)						
100k ^	Payout (150k)						
20k ^	News/Payout (70k)						
	News/Payout (20k)						
	Total m						
					Kane estimate 2005-2007		Kane estimate 2005-2007

4. Broadcast market sizing 2005

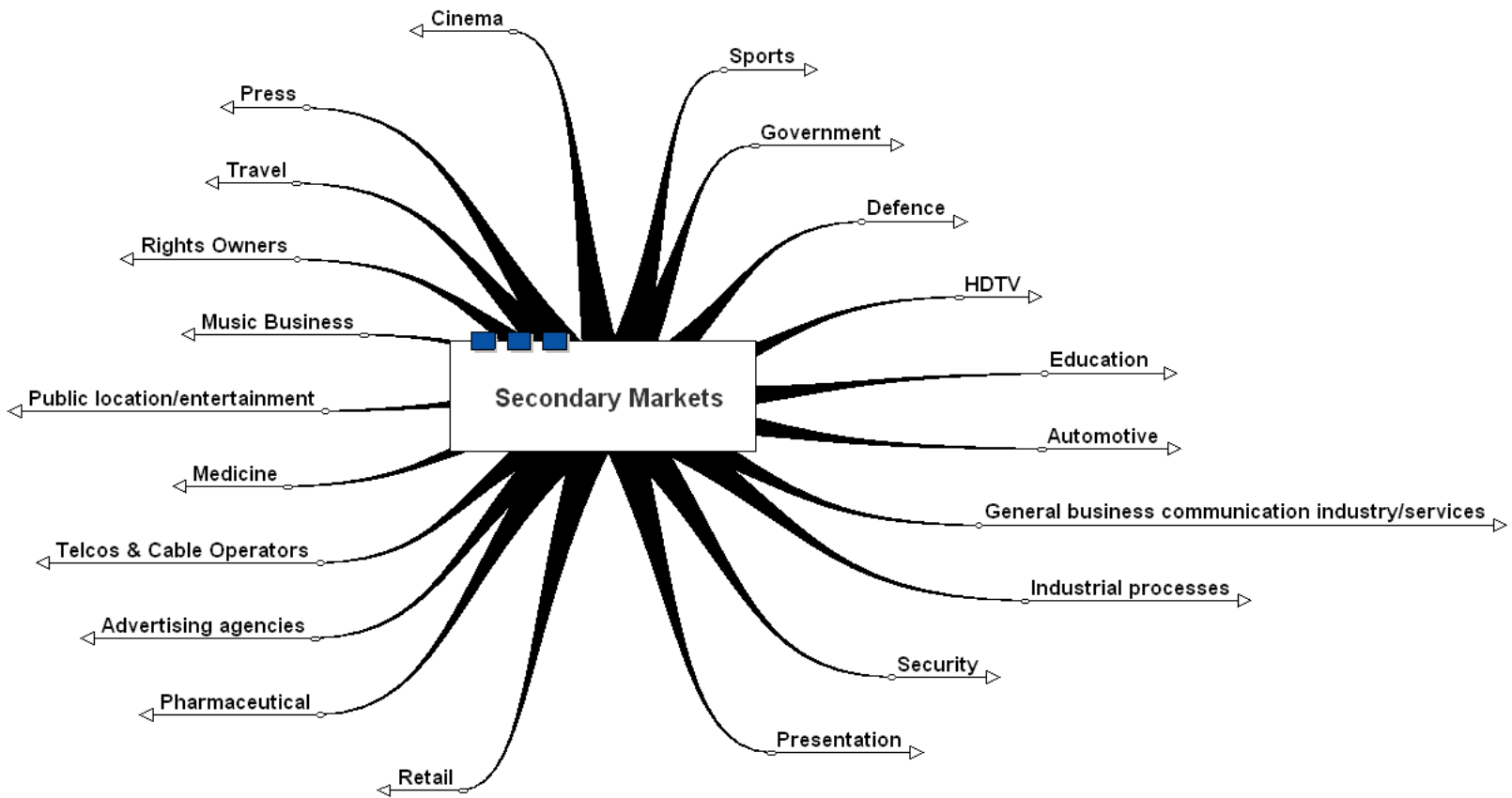
- Premium groups in the 22 western countries in Europe



5. Complementary market sizing 2005

- SAN/server solutions for content production and distribution.
- Video DAM applications
- EMEA and North America
- 3 years : 2005-2007
- Based on the current video applications and references of the main suppliers of servers, editing, DAM, supplemented by our own original research

5. Complementary market sizing 2005



Already completed: Sport

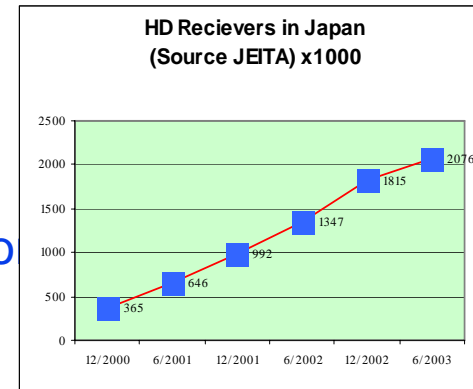
	TV channels	Services providers	Leagues & Gov. bodies	Clubs	Stadia	Marketing Companies
Production	2. Magazines Production		5. Video coaching			
Live-production	3. News Production				8. In-house entertainment	
	1. Replay & Highlights production					
Archive or video repository			6. Heritage center			
	4. Video archive		7. Distribution factory			7. Distribution factory
Distribution	9. Internet portal		9. Internet portal			9. Internet portal

- Forthcoming markets:
 - Government and eGovernment
 - Defence
 - Surveillance
 - Corporate (manufacturing and services)
 - Branding and Advertising
 - Telecommunications
 - Other Media (i.e. non-broadcast)
 - Medical
 - Education



6. HD market place 2005

- Sums up the state of play today in the USA, Japan, China, Australia, Korea, and in Western and Eastern Europe.
- Covers **all aspects**:
 - Consumer equipment
 - HD TV-channels in the world,
 - HD production houses and content creators
 - HD Catalogues and rights owners
 - Standards initiatives and strategies
 - HD services, technical processes
 - The regulatory environment, and government strategies
 - The strategy of the big media groups launching HD channels
 - Strategies of TV groups in Europe



Korean channels	#hours /day	Programs
KBS		
SBS		
MBC		
EBS		

7. NRCS 2005

- Analysis of references among NRCS suppliers (AP-ENPS, Avid iNews, Dalet, Autocue, Octopus, S4M) as well as some bespoke applications: Pronews, Gilda, Meta, Star
- Visits to 70 newsrooms in the world
- Product comparison (based on dozens of features)
- “Best practice”
- Workflow analysis: graphics, automation, archiving, browsing, device integration
- News gallery integration
- TV-radio-web synergies
- News distribution models and network (case studies: FranceTV, CBS, ABC, NBC, CNN, BBC, ...)
- Journalist and newsroom job content evolution
- Return on investment and competitive advantage

- Management methods supported by benchmarking
- Technology strategy and choice
- Implementation and Change Management
 - Methods and Workflow
 - Job Organization

8. Kane references

- Kane has established references among Europe’s major broadcasters: France Télévisions contributed to the original study on server-based news; Arte, to newsroom organization; CSA for high definition, and TSR on editorial innovations. But since then the coverage has broadened: RTBF, BBC, BBC Regions, ARD, RTL, ORF, and many others.
- Our approach for a new client generally includes a specific analysis of how these major broadcasters handle the client’s key issues.
- Kane has recently completed studies about the delivery of a new 24-hour information channel for France Télévisions; and a comparative study on how 20 major TV channels are adjusting their methods to attract younger audiences, carried out with the BBC for Newsxchange.



8. Kane references

- Kane has also developed its consultancy activity among the major worldwide manufacturers of broadcast systems and software.
- This consists both of measuring how closely products meet the real needs of broadcasters using appropriate measurement and evaluation techniques, and of helping manufacturers design, develop and deliver to market their products: Harris in the USA and globally, Avid Europe, Sony Europe, Thomson (Grass Valley), and numerous other manufacturers active in the areas of asset management (such as Blue Order and Dalet); in graphics (such as Vizrt); or in integration (Cap Gemini).

9. Pricelist

Kane's Report	Price	Available	Conditions
Newsroom2005	8000 Euros	Since 2001 April and September	Includes a presentation (Travel expenses in addition) Include the current and the future version when to close to the date of the future release
MAM 2005	8000 Euros	Since 2002 April and September	Dito
TVHD2005	8000 Euros	Version 1 : June 2004, Version 2: March 2005, Version 3: September 2005	Includes a presentation (Expenditures, travelling from Paris, in addition)
NRCS2005	8000 Euros	Version 1: End of August, (prefinancing stage)	Includes a presentation (Travel expenses in addition)
Broadcast market sizing 2005	8000 Euros per region (4 regions)	Available in the 4 regions since January 2005	Includes a presentation (Travel expenses in addition)
Complementary market sizing 2005	5000 Euros per market	Sports available Other markets (1): end of the year depending in prefinancing	Includes a presentation (Travel expenses in addition)

(1) List of 10 complementary market: Sports, Medical, Government, Defence, Education, Surveillance, Other Media, Corporate (all sectors of industry and services), Branding and Advertising, Telecommunication & html