Music Labels:

Striking the Right Chord for Stimulating Revenues

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Contents

1 Abstract

While the overall global music industry is growing, the recorded music segment is in decline. Although digital music revenues have been growing strongly, they have been unable to sufficiently offset the steep decline of the entrenched physical recorded music business. In particular, the value of the recorded music business is being depressed by changing consumer behaviors driving the "unbundling" of the album, non-traditional competitors making disruptive moves across the music value chain, and also the effects of online and physical piracy. Despite these alarming trends, there are a number of opportunities for players in the recorded music industry to stimulate their revenues. Music labels can offer value-added physical and digital content that consumers are willing to pay a premium for. Music industry players can also offer consumers a more flexible download value proposition by offering DRM-free music as well as pricing models relevant to the way they consume digital formats. In addition, music labels can partner to create aggregation platforms, which provide genre recommendations in order to drive cross-selling opportunities, and they can also evaluate alternative music distribution options.

2 Introduction

The global music industry is growing. Between 2006 and 2007, worldwide music industry revenues grew by 1.3% to $62bn. However, this marginal growth masks two starkly contrasting trends, for while live music[1] and music publishing[2] revenues grew strongly by 9% and 4% respectively between 2006 and 2007, recorded music[3] revenues declined by 2.5% to $35bn.[4]

Within the recorded music sector, physical music sales have been experiencing terminal decline in recent years. Between 1999 and 2006, physical music revenues in the US declined by 34% from $13bn to $9bn, while the number of units purchased fell by 45% to 643 million. Conversely, digital music sales experienced stellar growth between 2004 and 2006, increasing by 900% to $1.9bn in the US.[5] However, growth in the digital music sector has still been insufficient to offset the declining physical sector and there are also early signs of a recent slowdown in digital revenue growth.

In France for example, year-on-year digital revenue growth declined from nearly 80% in 2006 to under 15% in the first half of 2007.[6] There are even alarming signs that digital revenues may be declining in certain developed markets. In the Netherlands and Italy for example, digital revenues for the first half of 2007 compared with the year before actually declined by 7% and 11% respectively.[7]

Amidst these trying times, there is still hope for the recorded music industry. While recorded music revenues have been declining, customers now consume more music than ever before. Indeed, in 2006 the average consumer in the UK spent 4.6 hours per week listening to recorded music, a 15% increase compared with 2001.[8] Although much of this growth in consumption is currently under-monetized, there is promise in the fact that over half of consumers are willing to pay a premium for recorded music when the proposition is compelling and the packaging is right.[9]

"Over half of consumers are willing to pay a premium for recorded music when the proposition is compelling and the packaging is right"

In this article, Capgemini's Media and Entertainment practice evaluates current sources of revenue destruction in the recorded music industry, and goes on to provide a number of pragmatic recommendations for traditional music labels seeking to stimulate revenues in their recorded music businesses.

1 Note: Live Music includes concert ticket sales, tour merchandise, music event sponsorship and other concert-related revenues. 2 Note: Music Publishing includes Income derived from mechanical royalties, public performances, broadcasts, cable, television, satellite radio and licensing of music for commercials, films, TV shows and video games. 3 Note: Recorded Music includes revenues from sale of physical music formats (including CDs, cassettes, LPs, vinyl singles and music videos), and digital music formats including online singles and albums (from a la carte downloads sites, subscription and streaming services, legal P2P sites, ad-supported sites and e-commerce-enabled social networks), and also mobile music downloads such as ringtones, mastertones, ringback tones and full-track downloads. 4 eMarketer, "Global Music – Tuning into New Opportunities", May 2007. 5 RIAA, "Year-End Shipment Statistics", 2006. 6 SNEP, "Bilan Econometrique 1er Semestre", 2007. 7 Music Ally, "The Report", November 2007. 8 Capgemini TME Strategy Lab Analysis. 9 Olswang, "The Digital Music Survey", July 2007.

3 Sources of Revenue Destruction

Driven by the development of broadband and the growing penetration of digital devices, music has become a multi-format industry. Digital delivery possibilities are transforming the traditional music value chain and depressing value for music labels. New music consumption patterns are rapidly emerging, which are having negative impacts on revenues, and piracy is placing firm downward pressure on revenues. In this section, we provide a brief overview of each of these sources of revenue destruction.

Change in Consumer Buying Patterns

A key trend triggered by the development of digital music and growing web usage is the "cherry-picking" of individual tracks online rather than the purchase of entire albums. In the UK, 37% of users who purchase legal downloads instead of CDs do so because they are able to choose only one or two songs from a given album.[10]

In 2006, digital singles represented nearly 70% of digital sales in the US, in contrast with physical formats where CD single sales represented less than 5% of total sales.[11] By the middle of 2007, the total volume of tracks sold in the US had actually decreased by over 10% compared with the year before as a result of consumers increasingly only purchasing single track downloads rather than albums.[12]

Moreover, the digital music phenomenon has reduced the price users are willing to pay for music. Compared with the average album price of €19 for a new release in 1996, most new album releases now command a price of less than €10.[13]

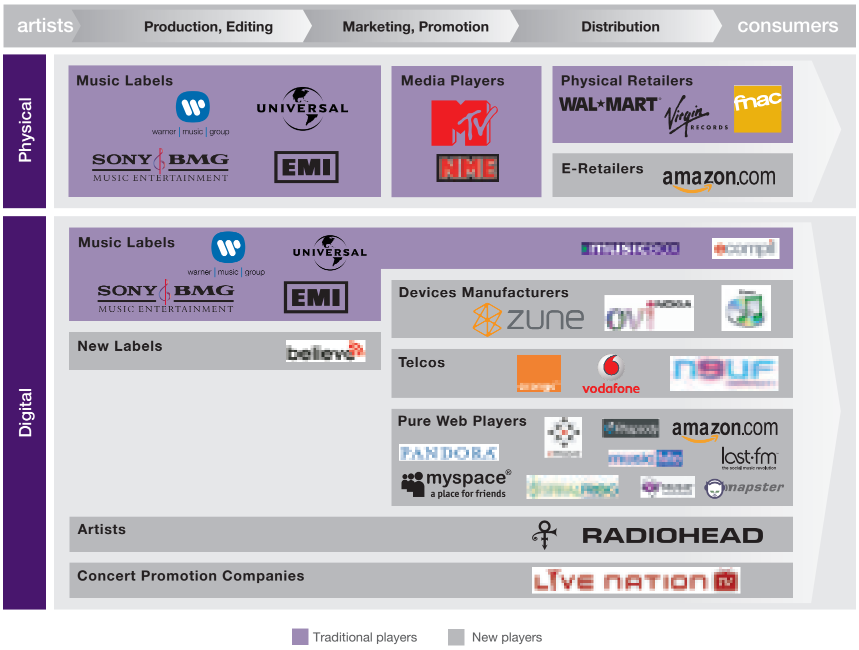
Value Chain Disintermediation

In addition to driving new consumer behaviors, digital music has also given rise to widespread reorganization within the recorded music value chain (see Figure 1). New players in recorded music distribution are taking leadership positions in digital sales, while artists are causing disruptions by increasingly bypassing established distribution channels.

Concert promotion companies in particular illustrate the move of players from different markets into the recorded music arena. Benefiting from concert revenue growth, these companies are competing with music labels by offering attractive propositions to artists, including support on recorded music, live music and other commercial areas. Madonna, for example, recently ended a 25-year relationship with Warner Music in favor of a lucrative deal with live event organizer Live Nation. The 10-year deal netted the artist $120 million in exchange for the rights to sell three studio albums, promote concert tours, sell merchandise and license her name.

10 Olswang, "The Digital Music Survey", July 2007. 11 RIAA, "Year-End Shipment Statistics", 2006. 12 Enders Analysis, "Recorded Music: the bad news continues", July 2007. 13 Prospect Magazine, "Off the Record", August 2007.

Figure 1: Recorded Music Value Chain Disruptions



Source: Capgemini analysis.

Furthermore, artists are increasingly relying on live events and performances to generate revenues, especially as live music revenues are showing robust growth compared with declining recorded music revenues (see Figure 2). Around 75% of the earnings of artists such as Madonna, Faith Hill and the Dave Mathews Band are now generated from concert-related sales.[14] As a result, independent labels and musicians are increasingly looking at recorded music merely as a means to promote live events, and not as the primary source of revenues. For example, in 2007 the artist Prince booked 21 concert dates in London and then gave away nearly 3 million copies of his latest album “Planet Earth” for free with The Mail on Sunday in the London area to promote the live events.

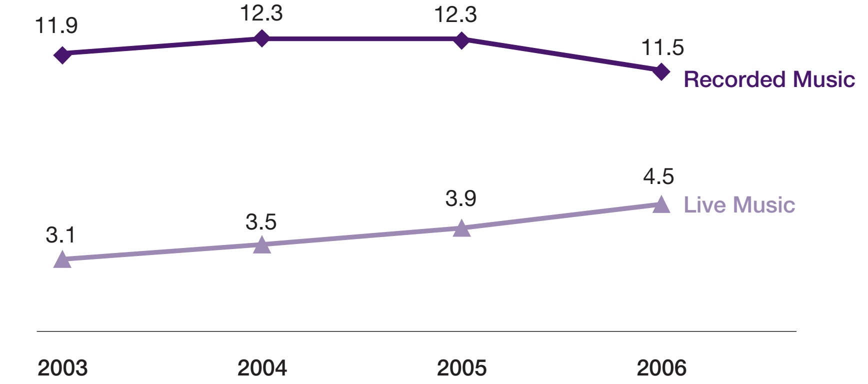
Piracy

A significant portion of recorded music value destruction is attributable to piracy. Of the various forms of piracy, illegal downloads of recorded music from peer-to-peer networks currently have the largest impact on the music industry. Indeed, revenues lost from P2P piracy are estimated at $3.7 billion in the US, while the illegal copying of physical CDs also contributes estimated revenue losses of around $1.6 billion.[15] Additionally, new forms of piracy are emerging, including the sale of tracks on illegal sites, LAN-based file-sharing, “digital stream ripping” or the use of software to record tracks from the Internet, and mobile music and ringtone piracy.

14 eMarketer, “Global Music – Tuning into New Opportunities”, May 2007.

15 IFPI, “The True Cost of Sound Recording to the US Economy”, August 2007.

Figure 2: Recorded and Live Music Industry Revenues ($bn), US

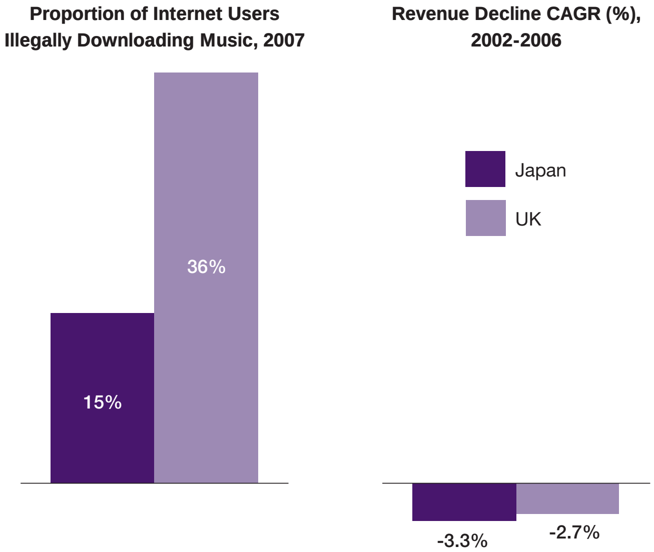


Source: Capgemini analysis. Live Nation Investor Presentation, March 2007; RIAA Report 2007; eMarketer, "Global Music: Tuning into New Opportunities", May 2007. Note: Recorded music includes both physical and digital formats. Live music revenues include concert ticket revenues and music sponsorship spending.

Although online piracy is no doubt a major issue, there is evidence to suggest that litigation, combined with the growth in paid online music services, is beginning to combat illegal music downloads. In the US for example, the proportion of users downloading music from legal paid sites has sharply increased compared with overall online music downloads. In mid-2006, consumer spend on digital music in the US grew 87% year-on-year, while spend on total recorded music during the same period declined by 6.1%.[16] The number of pirated music files in circulation online also fell from 1.1 billion in 2003 to 0.85 billion in 2006, while during the same period, the number of legal online music download sites increased from 20 to over 100 and traffic on these sites increased dramatically.[17] In addition, there is also evidence to suggest that the number of consumers using illegal file-sharing services is actually declining. For example while broadband penetration, a major enabler of illegal file-sharing, grew from 7% to 40% between 2002 and 2006 in Europe, the proportion of internet users regularly using illegal file-sharing services fell from 18% to 14%.[18]

16 eMarketer, "Digital Downloading: Music, Movies and TV", January 2007. 17 IFPI, Credit Suisse, "Global Music Industry: Just the Two of Us", June 2006. 18 IFPI, "Digital Music Report", 2007.

Figure 3: Illegal File-Sharing Incidence Versus Recorded Music Market Decline, Japan and UK



Source: Capgemini estimates based on IFPI and RIAJ data; Olswang, "The 2007 Digital Music Survey", July 2007; Universal McCann, "Anytime, Anyplace: Understanding the Connected Generation", 2007.
Note: Incidence of piracy in the UK includes those who have ever shared files illegally online. Incidence of piracy in Japan includes those who have ever shared files illegally over mobile, as over 90% of digital music in Japan is downloaded through mobile channel rather than online.

"Evidence from countries such as Japan seems to suggest that piracy is not the most important factor in the decline of recorded music industry revenues"

Furthermore, evidence from countries such as Japan seems to suggest that piracy is not the most important factor in the decline of recorded music industry revenues. Despite relatively low levels of piracy in Japan, particularly in terms of P2P file-sharing, recorded music revenues still declined at a CAGR of 3.3% between 2002 and 2006 (see Figure 3), much the same as the UK's 2.7% decline where piracy rates are considerably higher than in Japan. The Russian recorded music industry, for example, also grew by 4% in 2006[19] despite having the world's second largest physical piracy market and being host to a number of illegal music websites.[20]

These trends imply that perhaps, despite its well-established impact, piracy is not the most important factor in the decline of recorded music industry revenues.

19 IFPI, "Music Market Data 2006", May 2007. 20 IFPI, "The Recording Industry 2006 Piracy Report", 2006.

4 Revenue Stimulation Strategies

Consumers now have access to a wide range of platforms and devices through which recorded music can be consumed, and they consume more music than ever before. However, recorded music revenues have failed to keep pace with this usage growth, resulting in the emergence of a "monetization gap." Despite this trend, it is still possible for music labels to begin closing this monetization gap and to increase recorded music revenues by deploying a number of revenue-stimulating strategies.

There is scope to boost physical and digital music sales by developing value-added content that consumers are willing to pay a premium for, as well as offering consumers more flexibility around how they purchase and consume digital music. There is a significant opportunity for music labels to grow usage and revenues through redressing the divide between the current digital music consumption experience and the latent desires of consumers. For example, while around 70% of consumers want DRM-free music,[21] only around a third of music that can be found on iTunes is DRM-free.[22] In addition, music companies have the ability to leverage their extensive catalogs to aggregate music, and to sell digital "playlists" around music genres. Finally, music labels can also explore the potential of alternative music distribution models. In the rest of this section, we outline each of these strategic options for growing recorded music revenues.

Develop Value-Added Content Consumers are Willing to Pay a Premium For

Although physical recorded music revenues are declining sharply, a significant proportion of consumers are still attracted by physical music formats. Over 70% of consumers intend to continue buying CDs in the future,[23] and among US "baby boomers," consumers between the ages of 43-66, over two-thirds only buy physical music formats with a further 26% buying both digital music and CDs.[24] Even among teenagers, a social group typically at the forefront of emerging consumer behaviors, 53% do not download any digital music at all, and 37% buy both physical and digital music formats.[25]

Key to this trend is the appeal of the tangible aspects of physical CDs and the wealth of additional material that CDs can offer in comparison with downloads, such as artwork, lyrics and bonus material. Indeed, 30% of consumers state album art, bonus materials and the tangible nature of the product as the main reason why they still purchase physical music.[26]

In order to mitigate the decline of physical sales as much as possible, music labels should enhance the physical music consumption experience and develop rich formats with value-added content that consumers are willing to pay a premium for. Indeed, over 55% of consumers would even be willing to pay a premium for albums with exclusive bonus content included.[27]

21 Olswang, "The Digital Music Survey", July 2007. 22 Capgemini Analysis; Company Websites. 23 Olswang, "The Digital Music Survey", July 2007. 24 eMarketer, "Could Boomers Save the Music Industry?" September 2007. 25 IDATE, "Enquete Use-IT", 2006. 26 IDATE, "Enquete Use-IT", 2006. 27 Olswang, "The Digital Music Survey", July 2007.

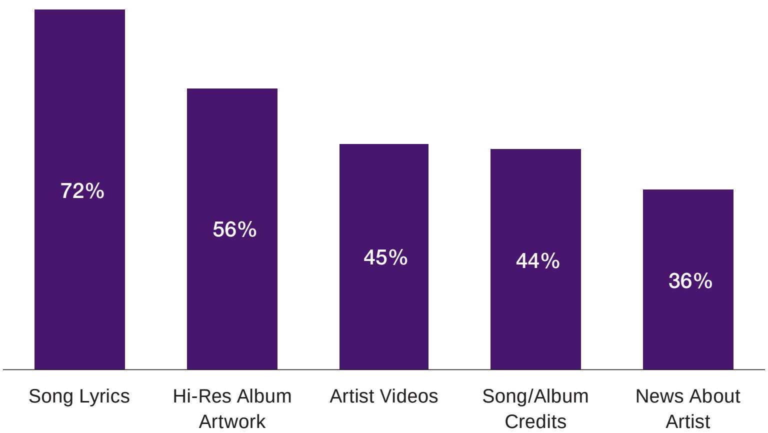
Some music labels have already seen early signs of success. In mid-2007, Walt Disney's music label Hollywood Records offered customers a new CD format packed with additional features for the launch of an album by teen punk band Jonas Brothers. Priced at $22.99, a $4 premium over the standard CD, it included two bonus tracks and a digital magazine with song lyrics, video segments, behind-the-scenes footage, printable photos, exclusive news links, a customizable poster creator, and a letter from the band.

Warner Music's new Music Video Interactive (MVI) format has also shown promising signs of success. First launched with Linkin Park's "Minutes to Midnight" album in mid-2007 and priced at $27.98, a $9 premium over the standard album, it incorporated stylized packaging and a host of bonus material including song lyrics, behind-the-scenes material, photo galleries, interviews, wallpaper, and a software tool to create ringtones from favorite tracks. Also, in return for registering their MVI disc online which helps Warner Music capture valuable customer insight, consumers are presented with links to artist blogs, exclusive news, and various concert ticketing and merchandising opportunities. During its first week of sales in the US, the MVI version of the album sold 60,000 copies, equating to 10% of all physical and digital units of the album bought in its various formats,[28] and 15% of revenues due to its premium pricing.

While the proliferation of digital single sales has fuelled a degree of commoditization in the digital music market, there is also potential to further grow digital recorded music revenues by enhancing the music consumption experience.

In addition to the purchase of music files themselves, there is strong customer appetite for rich content which enhances the digital music consumption experience. Indeed, if offered, over 70% of digital music consumers would like to receive song lyrics with music downloads and over 45% would be interested in additional video material[29] (see Figure 4). Warner Music also saw considerable success with the launch of a premium version of the same Linkin Park album on the iTunes music store in mid-2007, which included additional video material and interviews. Although priced at $11.99, $2 more than the standard album also available on iTunes, 97% of consumers opted for the more expensive version.[30]

Figure 4: Proportion of Music Downloaders Interested In Value-Added Content, Worldwide, 2007



Source: Soundcrank, "Is the Future of Music Selling Music?", August 2007.

28 Reuters, "Chart-Topping Linkin Park Puts MVI Format on the Map", May 2007; Hollywood Reporter, "Standing ovation for MVI format", June 2007. 29 Soundcrank, "Is the Future of Music Selling Music?", August 2007. 30 Hollywood Reporter, "Standing ovation for MVI format", June 2007.

Increase Flexibility of Digital Download Value Proposition

There is scope to grow recorded music revenues by offering customers greater flexibility in the ways they can purchase and consume digital music, for example, by offering digital music free of DRM[31] to increase usage and by offering flexible pricing that is cognizant of how customers consume digital music.

Offer DRM-Free Music Formats

By offering DRM-free content, music labels could realize significant revenue generating opportunities. Indeed, almost 70% of consumers feel digital tracks are only worth downloading if they are DRM-free, and around 40% of consumers would be willing to pay more for DRM-free music.[32]

EMI began offering DRM-free music downloads from the middle of 2007, and Universal Music Group recently initiated a limited trial. EMI agreed to allow the iTunes music store to sell DRM-free audio and video tracks at a cost of $1.29, a 30% premium over tracks with DRM. As a result of launching DRM-free music, EMI has seen some initial successes. For example, downloads of Pink Floyd's Dark Side of the Moon album increased by 350% in the week after launching DRM-free music, equating to 3,600 downloads per week compared with the average of 830 per week for the previous three months.[33]

After moving to DRM-free music from independent artists, Deutsche Telekom's Musicload service also saw sales of DRM-free tracks and albums increase by 40% compared with protected music.[34] In addition, 7 Digital, a music download service in the UK, also experienced a similar usage uplift by offering DRM-free music. While DRM-free music comprises 60% of its 3 million track catalog, it accounts for nearly 80% of all downloads, suggesting consumers download more when content is free of restrictions.[35] 7 Digital also found that DRM-free music encouraged the purchase of digital album bundles rather than single tracks. Indeed, albums represent 70% of 7 Digital's downloads by value, compared with the average of just over 30% in the US.

Offer Flexible Pricing Structures

Recorded Music labels should offer innovative pricing models to differentiate from the "pay-per-track" model popularized by iTunes.

For example, "all-you-can-eat" subscription services like those currently offered by online players such as Napster, Rhapsody and Microsoft Zune Pass are gaining in popularity with heavy music consumers. Indeed, up to 70% of teenagers would be willing to pay €10 per month for an unlimited digital music subscription service.[36]

Some players have already begun adopting similar models. Indeed, music labels including Universal, Sony BMG, Warner Music and EMI have partnered with Omnifone and various mobile operators around the world to launch an unlimited mobile music download service in mid-2007 called "MusicStation", priced at £1.99 per week in the UK for example.[37] MelOn, SK Telecom's music service in South Korea, also offers an unlimited subscription service for a monthly fee of €4, allowing tracks to be played on any device for up to one month. The service has seen strong uptake from consumers, with 15% of SK Telecom's 4.5 million regular MelOn users signing up to the subscription service.[38]

31 Note: Digital Rights Management (DRM). 32 Olswang, "The Digital Music Survey", July 2007. 33 PaidContent, "DRM-Free Swells Sales", June 2007. 34 Yankee Group, "Kill DRM, Vol.1", April 2007. 35 Computerworld, "DRM-free music boosts online album sales", November 2007. 36 IDATE, "Enquete Use-IT", 2006 37 The Inquirer, "Omnifone launches iTunes killer", February 2007. 38 IFPI, "Digital Music Report", 2007.

In addition to offering compelling subscription propositions, there is also potential to drive significant usage growth by implementing variable pricing structures for d igital content, similar to physical CD sales. For example, while nearly half of consumers are willing to pay a premium for newly-released digital tracks, 60% feel tracks by new or unknown artists should be cheaper, and nearly 85% of consumers feel older tracks should be cheaper than new releases.[39]

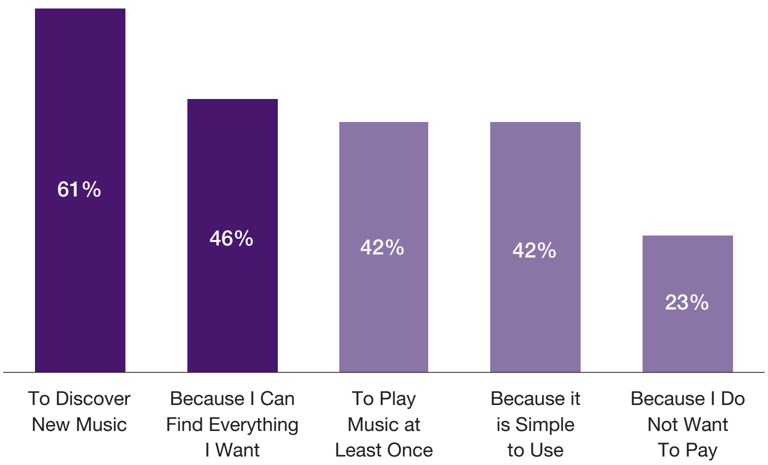
Develop Aggregation Platforms to Drive Cross-Selling Opportunities

With their extensive music catalogs and deep content knowledge, music labels should consider collaborating to form aggregation platforms selling directly to consumers, as well as partnering with mobile operators. By doing this, music labels will be able to satisfy latent consumer demands around how they would like to explore music online.

"Consumers use illegal download sites because they can discover and sample a wide range of new music"

Consumers use illegal download sites because they can discover and sample a wide range of new music. Indeed, over 60% of French users of illegal file-sharing sites state the ability to discover new music as the main reason for using their services (see Figure 5), closely followed by the ability to find what they are looking for, while less than a quarter state not wanting to pay for downloads as a key driver.[40] Similarly, while social networks legitimately allow consumers to discover new music, the subsequent purchase can be far from simple, and nearly 50% of consumers would prefer a simplified buying experience.[41]

Figure 5: Reasons For Using Illegal Music-Sharing Services, Proportion of French P2P Users, 2005



Source: La Documentation Francaise, "Le téléchargement sur les réseaux de pair à pair", 2005.

If music labels can create an aggregation platform where various genres and varieties of music are available "under one roof," where search and discovery of music is encouraged, where consumers have a wider range of content to choose from, and where the purchase experience is simple, many users of peer-to-peer sites, and potentially social networks, will migrate to this platform.

39 Olswang, "The Digital Music Survey", July 2007. 40 La Documentation Francaise, "Le téléchargement sur les réseaux de pair à pair", 2005. 41 Olswang, "The Digital Music Survey", July 2007.

When creating this aggregation service, music labels should also take pointers from the success of recommendation-based streaming services such as Pandora and Last FM, and incorporate a recommendation engine to encourage experimentation with new music and to stimulate opportunities to cross-sell artists and promote new talent. Indeed, Last FM has 20 millions active users, while Pandora receives almost 3 million unique visitors each month.[42] The success of these initiatives highlights the monetization opportunity available to music labels by selling "digital playlists", or compilations of tracks belonging to similar or related genres.

A number of online and mobile music stores have already started experimenting with the sale of digital playlists; for example, Apple with its celebrity playlists on iTunes, Neuf Telecom launching a genre-based subscription service, and Nokia with its "Music Recommenders" service.

In addition to creating this aggregation platform aimed at satisfying mass-market consumer demand, music labels should also consider launching a variety of niche genre-focused aggregation services. With a focus on specific music communities, exclusive rich content, and the ability to offer even more targeted recommendations and value-added bundles, services such as these could prove to be an extremely compelling proposition for "expert" consumers with deep and highly specialized interests. In addition, these passionate music consumers are frequently less price-sensitive when considering purchases of premium content related to their interests, offering music labels a range of unique monetization opportunities.

Evaluate Alternative Distribution Models

The business model for digital music has mainly been driven by device manufacturers. Music labels are finding it increasingly difficult to negotiate favorable terms with dominant players in the growing online distribution space. Music players will need to develop alternative music distribution models in order to retain control over digital distribution.

Universal Music for example, is planning a proposition called "Total Music"—a subscription service that proposes to offer consumers an alternative to the iTunes store. Under plans still being formalized, in return for "all-you-can-eat" music services, owners of music devices would need to pay a monthly subscription fee of around $5—which goes directly to the music labels—for the lifetime of the device, or contract if the music device is a mobile phone.[43] However this subscription would most likely be absorbed by device manufacturers or mobile operators, effectively making the service free to consumers.[44] Universal is reportedly discussing partnerships with Sony BMG and Warner Music, which could ensure as much as 75% of the recorded music sold in the US be made available on the service.[45]

42 Guardian, "Music: Charts retuned as web decides what's No 1: Music industry magazine to list Last .fm listeners' habits alongside traditional sales", August 2007; The Oakland Tribune , "Pandora lets listeners have music as they like it", September 2007. 43 Business Week, "Universal Music Takes on iTunes", October 2007. 44 Business Week, "Universal Music Takes on iTunes", October 2007. 45 Business Week, "Universal Music Takes on iTunes", October 2007.

“Recorded music players must work quickly to build integrated propositions that offer artists true partnerships”

In conclusion, there are number of strategies recorded music labels can deploy to stimulate revenues including developing value-added content consumers are willing to pay a premium for, enhancing the flexibility of download propositions, developing an aggregation platform to increase cross-selling opportunities, and by experimenting with alternative distribution models. Some of these initiatives will come with their own inherent challenges. For example, despite the potential revenue upside, DRM-free music also increases the probability of piracy growth. In order to mitigate this threat, music labels will need to offer attractive pricing models and develop an enhanced customer experience.

In addition to these opportunities for stimulating recorded music revenues, music labels must also strive to leverage monetization opportunities in the vibrant live music and music publishing segments. Time is short, though. Still reeling from the shockwaves sent by Live Nation's disruptive foray across the value chain, recorded music players must work quickly to build integrated value propositions that offer artists true partnerships, and offer consumers rich and immersive experiences, whether they are buying their favorite artist's CD, downloading their deluxe digital bundle, watching their music video on TV, or enjoying a live concert.

Some recorded music players are already taking tentative steps towards creating integrated value propositions through acquiring other music players, and by proposing new “360°” agreements to their existing artists spanning recorded music, live music and music publishing activities. Sony BMG for example acquired Arachnée Productions, one of France's largest live music companies. Similarly, Universal Music acquired Sanctuary in the UK, a live music, merchandising, and talent management company.

Developing integrated value propositions such as these will also enable recorded music players to capture lucrative brand partnership revenues, which have traditionally been accrued by artists' management companies. Beyoncé for example, and her management company Music World Entertainment have forged highly profitable sponsorship deals with Givenchy and Samsung around the launch of her “B'Day” album, with L'Oreal Paris and Samsung who sponsor her “Beyonce Experience” live tour, and also wider celebrity endorsement deals with American Express and Emporio Armani.

Success will require music labels to invest in building a host of additional capabilities. They will need to significantly enhance their rights negotiation capabilities to allow them to create offerings around their artists spanning recorded music in its multitudinous formats, touring, merchandising and brand associations. Music Labels will need to develop a deeper understanding of consumer behaviors, and strive to create the right content to attract users to portals. They will need to develop sizeable web audiences and employ tools such as viral marketing through discussion forums, social networks and blogs to promote artists and genres online. Finally, music labels will need to consider how they can strengthen their partnerships with artists, device manufacturers, online channels, and perhaps the greatest challenge of all, how they can forge mutually rewarding partnerships with other music players.

About the Authors

Jerome Buvat is the Global Head of the TME Strategy Lab, based in London. He recently championed a variety of studies including an analysis of mesh networks and the development of home gateways. He closely follows the broadband market and the emergence of alternative technologies and business models. Jerome is often called on to speak at industry conferences/events on these and other telecom and media related topics. Prior to joining the Lab, Jerome led a variety of strategy projects in the telecom sector, focusing particularly on the mobile, broadband and wholesale segments.

Patrick Ferraris is vice president and leader of Capgemini Consulting TME France. Patrick has more than 15 years' experience in consulting, of which 10 have been in the telecom and media industries. He has led major strategic and performance improvement projects for mobile operators, triple-play operators and media players (TV, music majors) with a recent focus on their digital strategy. He is based in Paris.

Nicolas Auberty is a managing consultant in Capgemini's Telecom, Media & Entertainment practice in France. His recent work includes a strategy project for a major music company. He has also worked on a number of strategy and marketing projects in fixed-mobile convergence, home network and web services / e-commerce. He is based in Paris.

Tushar Rao is a senior consultant in the TME Strategy Lab. His recent work includes an evaluation of fiber deployments in Europe, online strategies for communications operators, and the development of fixed-mobile convergence offerings. He has also authored a paper on the innovation challenge facing telecom operators. His current work focuses on assessment of Internet TV and its implications for pay TV providers. Prior to joining the Lab, Tushar worked with a leading Indian operator, where he was responsible for developing managed data services for enterprises. He is based in Mumbai.

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Lab activities include:

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For more information contact:

Jerome Buvat
Head of Strategic Research
Telecom, Media & Entertainment
jerome.buvat@capgemini.com
+44 (0) 870 905 3186

297_20071217

www.capgemini.com/tme

Australia
Level 4
50 Carrington Street
Sydney NSW 2000
Tel: +61 2 9293 4000

Belgium
Bessenveldstraat 19
B-1831 Diegem
Tel: +32 2 708 1111

China
Unit 1101-04, Azia Center
1233 Lu Jia Zui Ring Road
Shanghai 200120
Tel: +862 161 053 888

Denmark
Ørnegårdsvej 16
DK-2820 Gentofte
Tel: +45 70 11 22 00

Finland
Niittymäentie 9
02200 Espoo
Tel: +358 (9) 452 651

France
Tour Europlaza
20 ave. André Prothin
92927 La Défense Cedex
Tel: +33 (0)1 49 00 40 00

Germany
Hamborner Strasse 55
D-40472 Düsseldorf
Tel: +49 (0) 211 470 680

India
Piroshanagar, Vikhroli
SEP2 B3 Godrej Industries Complex
400 079 Mumbai
Tel: +91(22) 5555 7000

Italy
Via M. Nizzoli, 6
20147 Milano
Tel: +39 02 41493 1

Middle East
P.O. Box 502 420
Dubai
UAE
Tel: +971 50 884 77 64

Netherlands
Papendorpseweg 100
3528 BJ Utrecht
Postbus 2575
3500 GN Utrecht
Tel: +31 30 689 0000

Norway
Hoffsveien 1D,
0275 Oslo
Tel: +47 24 12 80 00

Poland
Al Jana Pawla II 12
00-124 Warsaw
Tel: +48 (22) 850 9200

Portugal
Edifício Torre de Monsanto
Lugar de Romeiras
Miraflores
1495-046 Algés
Tel: +351 21 412 22 00

Spain
Edificio Cedro
Calle Anabel Segura, 14
28100 Madrid
Tel: +34 91 675 7000

Sweden
Gustavlundsvägen 131
PO Box 825
161 24 Bromma
Tel: +46 8 5368 5000

United Kingdom
76 Wardour Street
W1F 0UU London
Tel: +44 20 7734 5700

United States
623 Fifth Avenue
33rd Floor
10022 New York
Tel: +1 212 314 8000