

changing

the rules of the game

new media in sports entertainment



Think Back. Think Forwards.

On January 8, 2010, an independent businessman from Rogers Park, Chicago, watched televised sports for 72 hours - setting the world record for the longest time spent watching sports TV. Although this was a bit excessive, many of us do find sport featuring in our lives more and more. But unlike the record holder, our experience is becoming more active, more mobile, across more channels and devices than ever before.

100 years ago

You went to the event (and bought a program if you could afford it). Maybe you saw an event report in the paper the next day. Local fans supported local teams.

50 years ago

The TV becomes a point of focus in many homes. You sat down together and watched set events at set times. In many countries we had a choice of two (or even one) channels. Some children even begin to support teams from different cities!

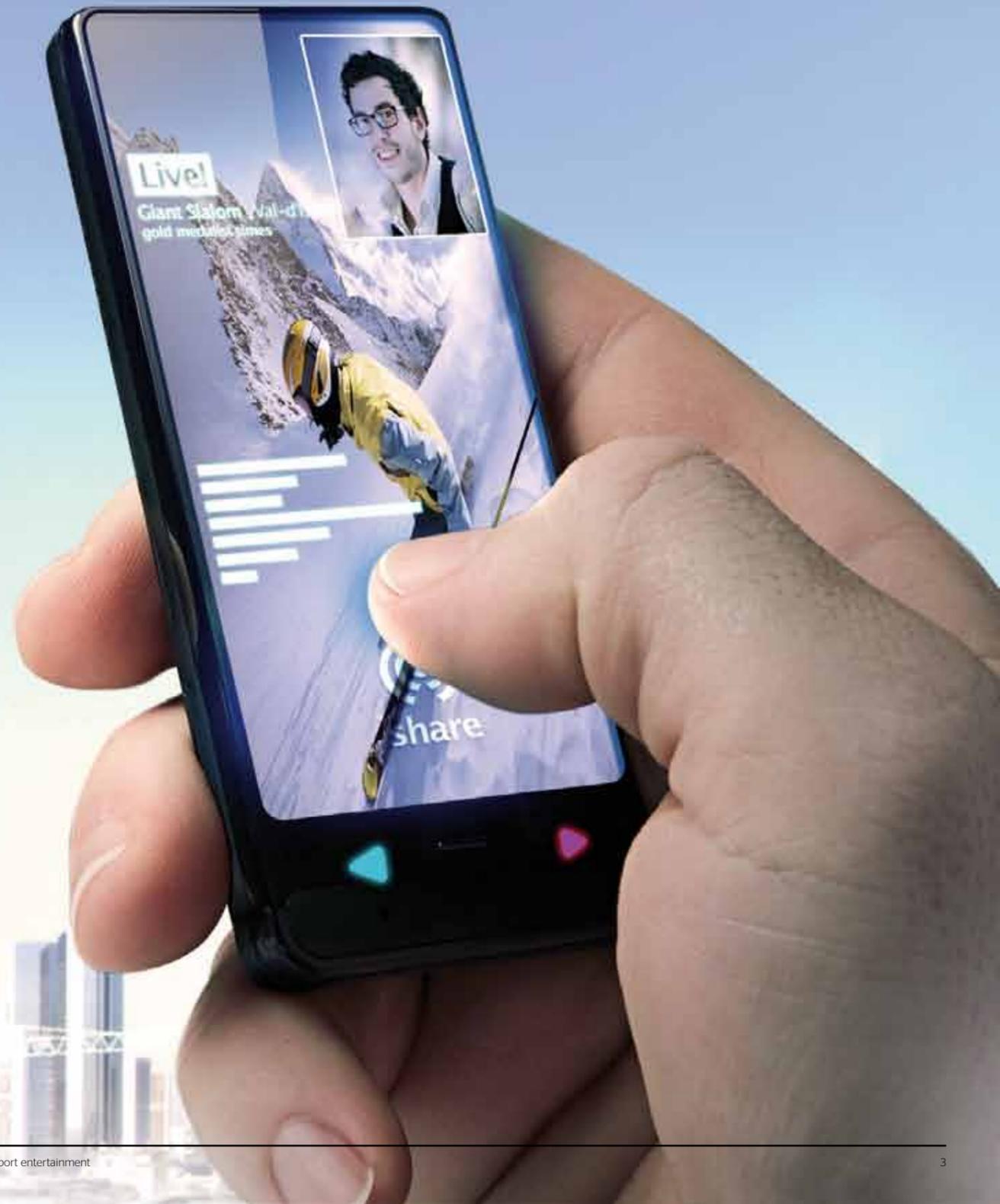
5 years ago

You can get scores and results on the train or at work. TXT and the internet are starting to change the sports experience. Sport is now global, but the experience is still essentially passive.

NOW!

All change. The new media explosion does more than begin to make "any sport - any event - any time - any device" a viable reality for the fan. It also begins to blur the boundary between gaming and reality, and it begins to make the digital experience of sport social rather than solitary.

New media is transforming the sports experience - and Atos is transforming new media in sports.



Why now?

For new media in sport, we are at a very special point in time, and as we shall see, Atos has a timely and compelling proposition ready to celebrate the opportunity. But before we look at that, let's ask, "Why now?"

It is about technologies:

- ▶ Universal internet access is the new reality in fixed and mobile
- ▶ Digital TV bridges the final gap between broadcast and "IT-cast" devices
- ▶ Combine automated meta-tagging with unlimited processing and storage and the technology barriers begin to dissolve



It is about people:

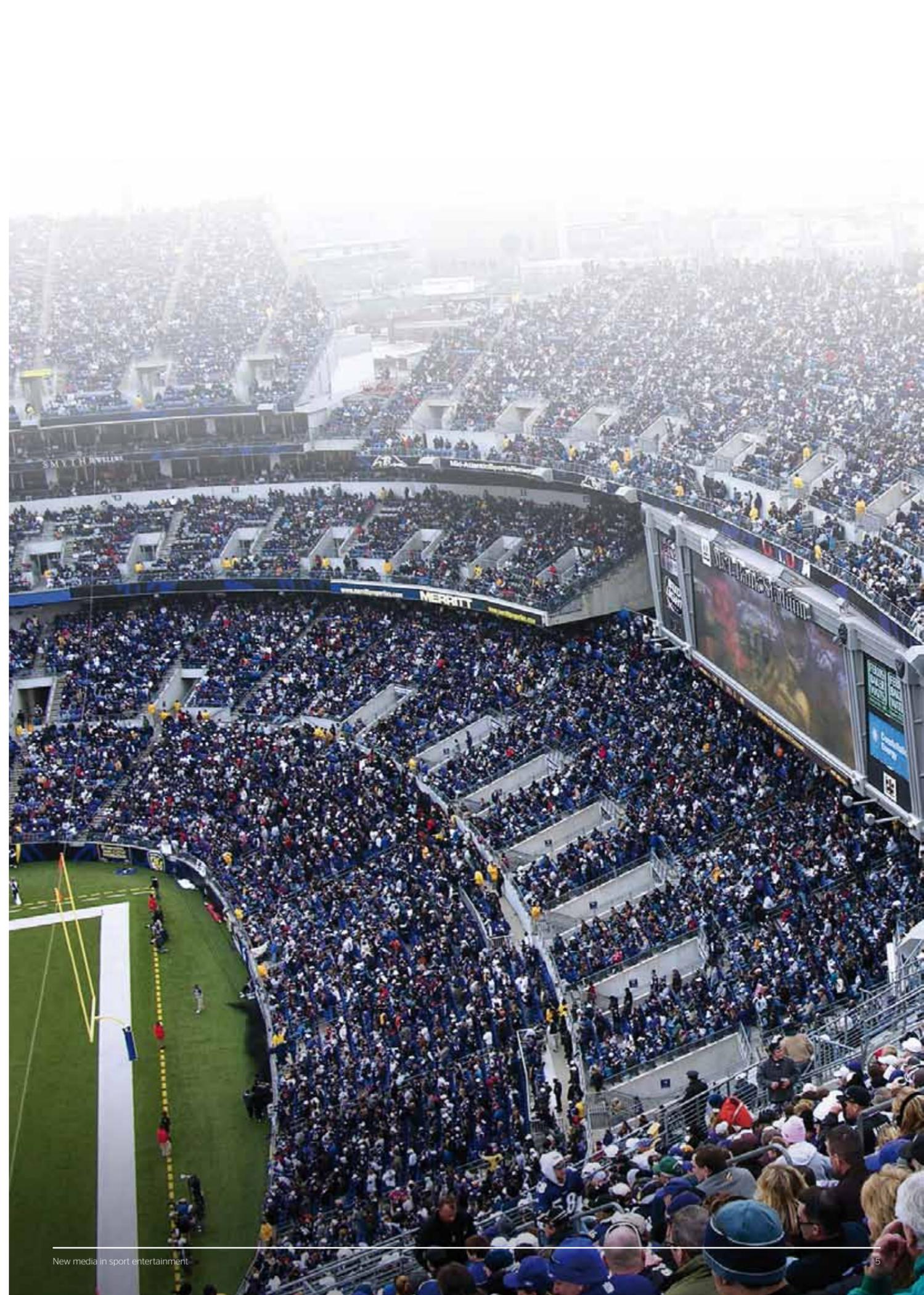
- ▶ Expectations of digital media quality have soared - now we expect digital to be "near life"
- ▶ Our digital habits have changed too - we expect choice in everything - device, location and content
- ▶ Life-styles become digitally interactive - this is no longer about passive observation



It is about globalization:

- ▶ As people explore the world physically and digitally, sports experience and branding becomes global - just think what "Brazil" means as a brand
- ▶ Players and play in all sports become completely internationalized

(This is not just about "big clubs and mainstream sports" - the online presence of the English Pétanque Association helps move boules from French village squares to the heart of East London.)



So what about business?

With technology, society and international markets all ready for New Media in Sport, who is best positioned to take advantage of these new business opportunities? In a world market for sports entertainment conservatively estimated to be fast approaching €20 billion, Atos believes that three sectors are particularly well positioned to take advantage.

Media Companies

- ▶ Where media companies own the sports content, they can package and repackage automatically for continuous resale
- ▶ This applies to both archive and current material - and also to "sports futures" according to rights
- ▶ It opens ongoing, smart advertising opportunities
- ▶ You also gain the opportunity to automate content packaging right down to individual customer
- ▶ You too can work in partnership with telecommunications companies and with sports associations

Telecommunications Companies

- ▶ If you own the networks - you can offer differentiated sports media services
- ▶ Virtual Network Operators, who own network access by proxy, are very much included
- ▶ For telecommunications companies and VNOs, differentiated sports media services become both a platform for new revenues and a powerful vehicle for building loyalty
- ▶ You can either do this alone or in partnership and can sell these services on to both media companies and sports organizations

Sports Associations and Rights Holders

- ▶ New media gives you the opportunity to take ever-greater ownership of consumption of your specific sport
- ▶ You can also develop new and more equitable models of partnership with telecommunications and media companies
- ▶ Opportunities for new business exist with all rights holders - in addition to sports associations and media companies, these include betting companies, events organizers and leagues

This is the right time for telecommunications, media and sports organizations to increase the business tempo for New Media in Sport.

There is, we believe, one critical key to success: continuously observe and anticipate how social behavior is affected by digital development, and ask, "What could this mean for us?"

Two things To think about

Perhaps the least mature elements of New Media in Sport are the business models. Two characteristics in particular stand out.

1.

Firstly, massively interconnected chains of payment challenge traditional business thinking. With sports pay TV, for example, the basic model is relatively simple:

1. **The channel pays for the rights to the event**
2. **Fans subscribe to the channel or the event and pay**
3. **Advertising augments revenue**
4. **Subtract the cost of rights and the cost of delivery from ticket and advertising revenue - and whatever remains is profit**

However, once new media hits the Internet, cable and broadcast - chains of payment become more complex, and the means to automate the business of handling millions of transactions takes you into new territory.

Fortunately, Atos knows how and can take full responsibility.

2.

Secondly digital rights management in sport has been a labyrinth from the start. The media companies have rights; so do the broadcasters. The sports associations have rights; and so do the clubs - and so do the individual players.

The Internet and new media opportunities mean that the rules of this game must change, and are changing. But for anybody wanting to build business in the world on New Media in Sport, it is essential to be able to manage this challenging landscape with efficiency and precision.

Fortunately, Atos can partner with you do help you do exactly that.

Get a taste of the WOW! New media in sport with Atos

The Atos New Media in Sport proposition adds stand-out WOW! to the fan's experience. When you join us in our new media workshops, you will experience this yourself, but for now, here is a paper taster ...

Even use multiple devices together - watch on the big-screen, game on a tablet and Twitter on the smart-phone



Sports fans select from multiple events and multiple viewpoints - from any fixed or mobile device.

Choose your preferred experts and commentators.

Access easily navigable, context-sensitive sports archive information.

User-driven advertising and sponsorship links.



Preference tags let fans track individual or team performance.

Smart replay - fans enjoy their personal favorite moments again and again - in slow-mo - from different camera angles.

Fans hook up - the new media sports experience is not solitary.

Personal set-up for language, colors, sounds and icons.



When you engage with Atos for new media in sport services, you gain a platform for highly differentiated sports positioning. This will lead to increased revenue and a heightened profile as a new media player.

Behind the WOW!

With Atos New Media in Sport you will set the gold standard for the fans' experience. The fan does not care what is in the engine room - but it's the engine room which delivers the profit and the power.

Atos provides end-to-end support for telecommunications and media companies and sports organizations wanting to take advantage of our New Media in Sport services. Our support services include:

Meta-Data Machining

Automated control over meta-data is at the heart of the business and technical model in New Media for Sport.

With each engagement, we identify the relevant approach and action it.

New Media Consulting

The Atos Consulting New Media team and R&D units will share our experience fully, helping you identify immediate new media opportunities and prepare longer term strategies.

Billing, CRM and Digital Rights Management

Atos is Europe's leading provider of transaction processing services. Not only can we manage all billing and CRM, however. Our Hi-Tech Transactional Services can manage and map the automated tracking of user-clicks and the associated delivery of content and advertising.

Atos

Business Intelligence Services

You must have a clear and accurate picture of trends and usage. We will ensure that all professional profiles within the client organization get the intelligence they need to craft new and profitable services.

Infrastructure Modeling

The infrastructure model is critical for you, for your partners, and most importantly for your customers. We will make the infrastructure you need available, providing cloud-based resources as a means of avoiding capital expenditure.

Business and Media Planning

New media success is about action, and we will work with you to prepare actionable business implementation plans. These will cover the full spectrum of requirement, from acquisition and distribution right through to billing and CRM.

Meta-data magic:

We believe that mastery of meta-data is what puts the magic in New Media in Sport. It's the ability to take the detail of any action, of any personality and any event - and to hook up with associated data that makes the experience.

It is key to the business model too - allowing you to understand trends and preferences from the individual consumer, through to entire target demographics. Atos, with its leadership in transaction processing, is at the forefront of automated meta-data manipulation.

In action with Atos

Atos has been the Worldwide IT Partner to the Olympic Games since 2001. In this role, we have been deeply involved in making sure that every edition of the games is delivered flawlessly.

Our experience speaks for itself:

- ▶ **Beijing 2008 - the biggest and most complex Games in history, with a worldwide audience of four billion**
- ▶ **All live results delivered within 0.3 seconds - with full access to comparative historical and archive data**
- ▶ **We processed 80% more competition data for media and news agencies**

Next steps

Atos is transforming the way that fans experience sport. As the gap between games and gaming closes, this most exciting of developments will gather even more momentum.

But what we regard as being jaw-dropping innovation today will seem normal tomorrow.

If you decide to take advantage of the New Media in Sport opportunity, the time is now. We are there to help, and we are ready with a solid and actionable approach.

We have designed our proposition to allow you to maximize the use of your skills and experience and to minimize the need to acquire skills which are alien for you but intrinsic for us. The joy of New Media in Sport is about doing and not talking. We are ready to welcome your team. To share hands-on, the experience we have created to date.

We are ready for the starting pistol.

Are you?

"Today people expect more content and more details about events as they happen. Through the it infrastructure that atos origin has designed, built and operated during the beijing 2008 olympic games, the competition results have been viewed and read by more people and on more channels - web, mobile phone and tv - than ever before. Atos, our long-term partner, is the brains behind the it operation for the olympic games, consistently delivering on schedule and within budget."

Jacques Rogge, President of the International Olympic Committee



About Atos

Atos is an international information technology services company with annual revenues of EUR 8.7 billion and 78,500 employees in 42 countries. Serving a global client base, it delivers hi-tech transactional services, consulting, systems integration and managed services. Atos is focused on business technology that powers progress and helps organizations to create their firm of the future. It is the Worldwide Information Technology Partner for the Olympic Games and is quoted on the Paris Eurolist Market. Atos operates under the brands Atos, Atos Consulting & Technology Services, Atos Worldline and Atos Worldgrid.

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