

2012 Olympics Business: ICT Sector Briefing August 2008

Prepared for Advantage West Midlands
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Key Statistics

2012 Olympic Games: 27 July – 12 August 2012
2012 Paralympic Games: 29 August - 9 September 2012
26 Olympic sports in 34 venues
20 Paralympic sports in 21 venues
10,500 Olympic athletes and 4,200 Paralympic athletes
20,000 press and media
Over 9 million tickets
4 Billion television audience

Key Organisations

LOCOG – London Organising Committee of the Olympic and Paralympic Games
ODA – Olympics Delivery Authority
LDA – London Development Agency

2012 Update

News and Comment:

(27-08-08) Since the start of the Beijing Games traffic levels on the www.london2012.com website have increased six-fold. Since Sunday 24th August, the traffic has shot up to twenty times the norm. 500,000 unique users have visited the site and London 2012 has recorded in excess of 3.5 million page views. Around 75,000 new subscribers have signed up to London 2012 updates during August.

(27-08-08) Advertisements at football stadiums may soon depend on where you watch the game. Viewers in China could catch an ad for a Beijing car dealership superimposed on Manchester United's Old Trafford ground. Finnish software startup Supponor's digital billboard replacement (DBR) software calculates the position of billboards at sporting events, allowing advertisers to superimpose their own digital content tailored to viewers in different markets.

(27-08-08) The London 2012 New Media team has a number of exciting initiatives in the pipeline, including a major education website launching in September and a sports participation project sponsored by Adidas launching later in the year. Longer term they have an ambitious plan to create digital canvases on and offline which contributors can fill with content and actually help dress the Games set, with their photos and images embedded in Games venues.

(26-08-08) Cabe and Design for London have praised the demountable stadium design for the London 2012 Olympics by HOK Sports, although they express concerns about some unresolved aspects. The original proposal for a floating

membrane “wrap” has now been superseded by a “wall” of vertical banners, on to which live images of the Olympic events could be projected and viewed from outside. Cobe and Design for London want to ensure that this highly visible element is striking and are encouraging the ODA to involve an artist in its design.

(25-08-08) Atos Origin has successfully delivered the IT infrastructure that makes the Games happen and transmits the results worldwide in less than 0.3 seconds. The IT team and the scale of the IT infrastructure has been similar to that in Athens, yet in comparison to the Athens 2004 Olympic Games, the IT team has:

- Provided the IT systems and software that processed and activated 70% more accreditations – over 340,000 in total
- Securely processed over 80% more competition data for media and news agencies worldwide – totalling 1.8 million messages
- Enabled almost 50% more stories to be published each day in English by the Olympic News Service – totalling an average of 500 stories a day. Around half of these have been translated into French or Chinese
- Added 40% more sports disciplines, eight in total, to the Commentator Information System to provide broadcasters with more detailed, real-time information about more sports
- Supported around 30% more hits on the intranet for the Beijing 2008 Olympic Games – INFO2008 – averaging around 1.2 million hits each day
- Collected and filtered over 12 million IT security events each day to detect any potential security risk for the Games IT systems. From these, less than 100 were identified as real issues. All were resolved, so there was no impact at all on the Olympic Games.

(25-08-08) Newham residents with spare rooms could benefit from a shortage of hotels during the 2012 Olympics. In fact 2,000 people have already signed up to RoomFT, an accommodation website that matches tourists and visitors looking for accommodation. It caters for people who may need a place to stay for as little as one night and homeowners looking to cash in on a spare room.

(23-08-08) The state-of-the-art audiovisual equipment Panasonic has contributed to the Beijing 2008 Games includes: large-screen display systems, surveillance cameras, broadcast equipment and professional audio systems. New RAMSA LA-3 large array-type speakers were also unveiled at the Opening Ceremony. Also on show during the Opening and Closing Ceremonies were the company’s ASTROVISION large-screen display systems.

(20-08-08) NBC and the BBC are among the media companies which have most enthusiastically and creatively activated their digital rights at the Beijing Games, offering an unparalleled choice of live action, highlights and analysis across a range of platforms. According to Roger Mosey, Director of BBC Sport, the BBC’s online coverage recorded more traffic in the first two days of the Beijing Games than in the

entire two weeks of Athens 2004. In addition, 4.4m users accessed the site on the first Monday of the games, a massive 1m of these accessing live streams.

(20-08-08) McDonald's has introduced a new game, but it doesn't come in your Happy Meal. Since March of this year, the TOP Olympic sponsor has been the force behind the largest alternative-reality game (ARG) and website, The Lost Ring: www.thelostring.com. The game culminated in Beijing around the Olympics closing ceremony.

(19-08-08) Rosetta Stone, a language-learning software maker, is leveraging its work with several Olympic athletes who used its programs to learn Chinese, prior to going to Beijing. After the games, the company is planning a media tour that to promote how using the language tools helped the athletes to enjoy a better experience in Beijing.

(19-08-08) A key lesson for marketers targeting the 2012 Olympics is that sponsors will have to develop intelligent strategies if they are to stand out from the expected onslaught of ambush marketing and make the most of their huge investment in the Games. The increased vigilance over sponsors' rights seen at the Beijing Games dovetails with another key development: the use of digital. The internet has been a key battleground between sponsors and non-sponsors at Beijing, and social media platforms such as YouTube, MySpace and Facebook have been making their Olympic debut.

(14-08-08) Global and domestic Olympic sponsors are missing out on opportunities by failing to integrate search marketing into their activation strategies, according to a study. Research by Synergy Digital, the joint venture between sponsorship specialist Synergy and digital specialist Altogether, found that none of the sponsors of Beijing 2008 and London 2012, which include brands such as adidas, BP and McDonald's, are ranking on the first page of Google's natural search results when consumers search for simple Olympic related terms, including 'Beijing Olympics', 'Olympic Games, or London 2012'.

(01-08-08) Communications and information technology company Harris has supplied high-definition and standard-definition (HD/SD) broadcast equipment to support broadcasters during their live coverage of the Beijing Olympics. Harris Broadcast communications president Tim Thorsteinson said, "Our Beijing warehouse is fully stocked to avoid time consuming customs checks and ensure replacement parts get into the hands of our customers as quickly as possible. In addition, more

than 40 Harris staff members at our Beijing research and service facilities stand ready to handle any support that customers may require during this significant event."

(30-07-08) LOCOG has appointed Nortel as their Official Network Infrastructure Partner and the latest London 2012 Tier One sponsor. Nortel will be responsible for providing BT with the equipment to enable secure and robust Wide Area Networks, wireless Local Area Networks, call centre and fixed telephony infrastructure. London 2012's communications will support over 205 international sporting organisations, 20,000 worldwide media, nine million spectators, and over four billion television viewers of the London Games.

(28-07-08) BAE Systems has acquired information management provider Detica for £538 million on the basis that it may be a key player in security arrangements for the 2012 Olympics. BAE are hoping Detica will help it access a homeland security and resilience market in the UK, which is expected to double to over £3 billion by 2011, much of which will be connected to the 2012 Olympics.

Contracts and Tenders

Relevant ODA tenders issued during August:

Publication Date	Title	Client
28/08/2008	IT software for the ODA (ref 994914)	ODA
21/08/2008	Equality and Inclusion E-Learning Programme	ODA
11/08/2008	Visitor Management and Pass Production System	ODA
11/08/2008	IT hardware for the ODA (ref 845611)	ODA
11/08/2008	Annual Juniper Support (Ref 845911)	ODA
11/08/2008	IT hardware for the ODA - servers (ref 846343)	ODA
01/08/2008	IT hardware for ODA - Monitors	ODA
01/08/2008	IT hardware for the ODA	ODA
31/07/2008	IT software for the ODA	ODA

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Relevant LOCOG tenders issued during August:

None

Relevant tenders issued by other parties during August:

Publication Date	Title	Client
21/08/2008	Digital Radio CCTV Video Transmission Equipment	Senator Security Services Ltd
19/08/2008	Framework Arrangement for National Testing of TETRA Communications System	National Policing Improvement Agency
08/08/2008	Survey Equipment	CarmichaelUK
08/08/2008	Server Racks - Hosting Environment	BiP Solutions Limited (BiP)
08/08/2008	Managed Internet Access Bandwidth Upgrade	BiP Solutions Limited (BiP)
08/08/2008	Computer Network Traffic Shaper	BiP Solutions Limited (BiP)
08/08/2008	Router Upgrade	BiP Solutions Limited (BiP)
01/08/2008	Digital Photo Frame 7"	The Corporate Merchandise Company Ltd

Relevant Contracts awarded during August:

Title	Client	Date	Winner
TV Reception Survey	ODA	27/08/2008	GTech Surveys Ltd.
Annual Juniper Support (Ref 845911)	ODA	20/08/2008	Computacenter
IT hardware for ODA - Monitors	ODA	13/08/2008	Quadnet Ltd
IT hardware for the ODA	ODA	13/08/2008	Eurodata Systems
IT software for the ODA	ODA	13/08/2008	Kroll Ontrack Ltd

Education Database for London 2012 On-line education programme	LOCOG	08/08/2008	Education Direct Ltd
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Current Supplier Listings – CompeteFor Registrations

As at 1st September there are 181 West Midlands companies (an increase of 47 companies since our last report), covering various areas of the ICT sector, listed and fully published on the CompeteFor System. The system-wide total for this sector is 2,607, an increase of 718 companies.

Updated Relevant Forecast Requirements - ODA

Contract title	Category	Procurement Start Date
New Utilities Wireless Telecommunications Network	Services	Q4 2008

Conclusions:

The Beijing Games have been a graphic demonstration of the growth in demand for data-centric value, and of the ability of new-generation ICT products, services and organisations, to satisfy that demand. Key partners such as Atos Origin, Omega and Panasonic, have all deployed and showcased step-changes in performance and reliability, and the development of new media opportunities will continue rapidly as we move towards 2012.

For ICT companies which are looking to win contracts to supply the 2012 Games, it is becoming more and more important to register and publish their details on the CompeteFor portal. This is because many more opportunities are being published on the system by the Olympics authorities and their contractors, and the deadlines for expressions of interest under the system are often extremely short.

The URL for the system is: www.competefor.com/london2012business

Companies operating in the construction sector and which are looking to supply the Lend Lease Athletes Village programme, have an additional opportunity source – the ‘Village Supply Chain’ portal. This operates separately from the CompeteFor system.

The URL for the system is: www.villagesupplychain.com