Over-the-Top Video (OTTv) in the Middle East: How to Win the Market

With growing demand among Middle East viewers for online video content, new players cast in the Netflix mold are competing with traditional TV companies for a market potentially worth $1 billion by 2020.
Around the world, over-the-top video (OTTv) is becoming more mainstream.¹ These services as a share of total television viewing have doubled globally over the past 12 months and exceed 30 percent in some developed economies. In the United States, 75 million households have an active OTTv subscription, compared to 32 million just four years ago.

Fueling this trend is the emergence of an abundance of user-friendly OTTv services, coupled with the increasing quantity and quality of content available online. Netflix launched its streaming service in 2007. As of April 2014, it was being used by 50 million people in 41 countries. Hulu, the OTTv service from NBC Universal, Disney, and Fox, now has six million paying U.S. subscribers. More pay TV operators are offering multiscreen packages to their subscribers and online-only packages to nonsubscribers in a bid to compete head-on with Netflix and similar services.

In the Middle East, OTTv is still nascent by global standards. Fewer than 100,000 homes subscribe to dedicated commercial OTTv services—less than 1 percent of television-viewing households.² Yet despite the low penetration, interest is strong—as suggested by the popularity of online short video services such as YouTube—and a flurry of new services has emerged (see figure 1). Etisalat introduced its eLife TV app on iOS in 2013, just one year after MBC’s Shahid TV app became the top downloaded app in the Middle East App Store. Istikana and icflix, which follow a Netflix model, launched the region’s first major standalone OTTv services in 2011 and 2013 respectively. OSN recently followed by announcing the launch of Go by OSN for non-pay TV subscribers. In 2014, beIN SPORTS relaunched its OTT service and began selling multiscreen subscriptions, and MBC partnered with Samsung to launch Shahid on smart TVs.

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1 In this paper, OTTv is defined as live streaming or on-demand video content offered on the open Internet, whether free or in exchange for payment. Internet protocol television (IPTV) is not included, as it is provided over a dedicated, managed network.

2 The Middle East is defined in this paper as the member states of the Gulf Cooperation Council (Bahrain, Kuwait, Oman, Qatar, Saudi Arabia, and the United Arab Emirates), Iraq, Jordan, Lebanon, and Syria.
With so many players positioning themselves to capture a share of the emerging OTTv market, several important questions arise: How much potential does the market actually offer? What can be done to maximize that potential? And who is best positioned to profit?

Spurring Growth of the Middle East OTTv Market

To better understand the potential for OTTv services in the Middle East and draw out the implications for market players, we surveyed 45 senior decision makers in the region representing the full television ecosystem: satellite pay TV operators, telecom operators, pure OTTv service providers, broadcasters, content producers, advertising agencies, and technology companies. Together, the companies they represent cover nearly 100 percent of the Middle East’s pay TV market and more than 75 percent of TV viewership. To incorporate consumer insights into our analysis, we surveyed nearly 6,400 consumers across all age and income groups in Saudi Arabia, the United Arab Emirates, Iraq, Egypt, Libya, Morocco, and Algeria.

Not surprisingly, the most crucial growth drivers that audiovisual executives cite are content, network speed, and devices. Other important factors include antipiracy measures, pricing, advertising revenue, and regulatory frameworks (see figure 2).

Figure 2

Key factors for OTTv growth

How important are the following factors to enable growth of paid OTTv?
(as rated by Middle East television industry executives)

Note: OTTv is over-the-top video.
Source: A.T. Kearney 2014 Middle East TV Executive Survey
Great content

The old adage “content is king” remains truer than ever for OTTv services. Today, many OTTv platforms focus on films and fail to address consumers’ desires for a broader array of content. Considering the Middle East’s multicultural nature, the content lineup needs to be much more varied than Hollywood blockbusters; it must also include Arabic or Bollywood content. For the more conservative part of the population, particular attention needs to be paid to offering a “safe” viewing environment.

Executives see the largest potential for services in series, films, and sports, followed by children’s programs and documentaries (see figure 3). Crucially, with close to a thousand satellite channels available for free, OTTv platforms need to secure access to marquee premium rights—rights that today are largely in the hands of the two leading pay TV platforms, beIN SPORTS and OSN.

Figure 3
OTTv adoption by genre

How much will consumption of the following genres on OTT take off in the next five years?
(as rated by Middle East television industry executives; 5=high, 1=low)

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<th>Genre</th>
<th>Rating</th>
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<tr>
<td>Films</td>
<td>4.3</td>
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<tr>
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<tr>
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<tr>
<td>Documentaries</td>
<td>2.7</td>
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</table>

Note: OTTv is over-the-top video.
Source: A.T. Kearney 2014 Middle East TV Executive Survey

The diversity of the Middle East provides both challenges and opportunities. Our consumer survey indicates considerable variation between consumer segments in their movies and series preferences (see figure 4 on page 4). A one-size-fits-all approach will therefore limit reach. This also suggests the potential for niche plays that could be based on relatively low-cost content, for example in comedy movies targeted at South Asians or action series for East Asian viewers. Language is another factor to consider. Eighty-one percent of Arab respondents prefer to watch series in their native Arabic, while their preferred language for movies is English.

Super-fast networks

According to Netflix, a download connection speed of five megabits per second is ideal for high-definition viewing, though speeds of just three megabits per second are acceptable for standard definition. In the Middle East, the availability and affordability of super-fast networks varies significantly among countries. In GCC countries, fiber optic and xDSL connections are nearly universally available. In fact, the United Arab Emirates has the highest penetration of fiber-to-the-home anywhere in the world, standing at 72 percent in September 2014.
In the rest of the Middle East, however, fixed broadband connections will remain confined to higher-income households, with penetration rates not expected to exceed 10 to 15 percent of households by 2019. Increased deployment of high-speed mobile networks provides a viable alternative from a performance perspective. The challenge, however, will be to find an economic model that compensates the costs of carrying massive amounts of data traffic on wireless networks.

As a result, OTTv services will prove more successful initially in the more advanced GCC markets than elsewhere in the region.

The **growth drivers executives cite most** are content, network speed, and devices.

### Device availability and user interface

The Middle East is quickly becoming one of the leading regions in the world in terms of smart device adoption. Among the consumers in our survey, smartphone penetration stands at 90 percent for higher-income consumers and 66 percent for lower-income segments. Tablet penetration is 60 and 27 percent respectively.
For tablets, which executives believe will be the most commonly used device for OTTv consumption, the number of users in the Middle East is expected to grow by 77 percent per year between 2013 and 2017 (see figure 5). Smartphone penetration—perhaps the easiest way to reach lower-income consumers—in the GCC countries is already among the highest in the world. Smart TV penetration will also spike upward, with smart TVs accounting for 80 percent of all new Middle East TV sales by 2017.

Figure 5
OTTv consumption by device

What will be the main devices where OTTv services will be consumed?
(as rated by Middle East television industry executives; 5=high usage, 1=low usage)

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<td>Tablets</td>
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<tr>
<td>Smartphones</td>
<td>3.8</td>
</tr>
<tr>
<td>Smart TVs</td>
<td>3.7</td>
</tr>
<tr>
<td>OTT boxes or dongles</td>
<td>3.3</td>
</tr>
</tbody>
</table>

Note: OTTv is over-the-top video.
Source: A.T. Kearney 2014 Middle East TV Executive Survey

Experts heatedly debate whether consumers will prefer using OTTv services on small screens, such as smartphones, or large screens, such as a television connected to a set-top box. In our view, to become mainstream, OTTv services will need to be available with an acceptable quality, user interface, and price on small and large screens alike because, among other reasons, distribution on multiple platforms can improve affordability by eliminating the need for consumers to buy additional hardware or devices.

In this regard, OTTv services should be made available not only on the provider’s own website and app, but also on other connected platforms—including smart TVs, game consoles, digital media players such as Apple TV, and smart dongles such as Chromecast. The key will be to provide a quality front-end platform for advanced content and metadata management from various providers—a platform that offers a consistent end-user experience, regardless of content or device.

A high-quality, simple user interface that provides unique features that traditional broadcasting cannot compete with will be essential. Content indexing, user-generated content ratings, and content discovery features are also important. For example, Netflix uses keyword-based content discovery to meet highly specific customer interests. This not only promotes usage but also increases the personal connection with customers, which in turns paves the way for targeted advertising.
Interestingly, even lower-income consumers consider multiscreen availability and advanced features to be important. In our consumer survey, lower-income customers had an even higher demand for content on demand and interactive viewing features than higher-income ones. To realize full market potential, OTTv operators will need to partner with social networking, gaming, and e-commerce providers to enhance the multiscreen experience, while also working with content delivery networks to ensure quality of service.

Collaboration on piracy and regulation

Online piracy remains a common menace to broadcasters, pay TV operators, and OTTv service providers. Our data suggests that although 27 million households across the Middle East and Northern Africa have access to pay TV services, fewer than seven million are actually paying for those services. Moreover, among the nonsubscribers we surveyed, 52 percent cite the availability of free—possibly pirated—content as a reason not to pay.

Industry players will need to band together to work with specialized antipiracy agencies to identify threats, Internet service providers to take down pirate sites, and national regulators to provide the overall legal framework and strong deterrents. The recently formed Broadcast Satellite Anti-Piracy Coalition had 18 members as of 2014, including IPTV providers (Etisalat and du), broadcasters (MBC Group, Rotana, and ART) satellite service providers (Arabsat, Eutelsat, Gulfsat, Nilesat, Noorsat, and Viewsat), direct-to-home provider OSN, and international rights owners (Motion Picture Association of America and WWE)—demonstrating that collaboration in this area is real.

Advertiser interest in OTTv will likely require cross-platform cooperation.

Affordable and flexible pricing

The Middle East region is a very diverse market, with significant differences in purchasing power across countries. Fortunately, micro-segmentation and targeted pricing models are easier to implement in OTTv services than in other competing audiovisual offerings. One aspect, of course, is to differentiate pricing between affluent and less affluent countries. Another is to target customer segments with tailored services and flexible pricing, moving away from a standard subscription model. For example, U.S. sports fans can buy season, team, week, day, event, or even pay-by-the-hour packs, thereby increasing the reach and proportion of viewers who will pay for content. Additionally, joining forces with payment service providers will help address the low credit card and bank account penetration in most of the region.

Capturing advertising revenue

Another crucial aspect to keep pricing affordable for the mass market is to offset subscription fees with advertising. Measuring a television audience is an inexact science in the Middle East, leading to major market inefficiencies. Also, the inability to target specific countries with traditional television advertising is a barrier to smaller advertisers and to those that want to reach a specific audience. By providing opportunities for demographic, geographic, and even behavioral targeting, OTTv offers the promise of a higher return on advertising spending.
Nonetheless, cross-platform cooperation will likely be required to secure advertiser interest in this new format, given OTTv’s relatively lower reach over the next few years.

### Growth Perspectives and Scenarios for OTTv Services

Today, the Middle East television market is worth $2.4 billion, of which OTTv constitutes less than 1 percent (see figure 6).³ Free-to-air (FTA) distribution captures the lion’s share with 63 percent, followed by pay TV with 29 percent.

Based on the variables described in the previous section, we have developed three scenarios to model the growth potential for OTTv services (see figure 7 on page 8). In the most conservative one, OTTv remains a niche value proposition with limited impact on the overall market. In the most optimistic one, OTTv services become mainstream and capture significant audience share from FTA and pay TV.

Figure 6
Middle East television market profile

<table>
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<th>Revenue by segment and type</th>
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<tbody>
<tr>
<td>$ million, 2014e</td>
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<tr>
<td>Free-to-air</td>
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<tr>
<td>1,519 (63%)</td>
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<tr>
<td>Pay TV direct-to-home</td>
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<tr>
<td>711 (23%)</td>
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<tr>
<td>Pay TV IPTV</td>
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<tr>
<td>167 (7%)</td>
</tr>
<tr>
<td>OTTv</td>
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<tr>
<td>21 (&lt;1%)</td>
</tr>
</tbody>
</table>

Notes: IPTV is Internet protocol television. OTTv is over-the-top video.
Source: A.T. Kearney analysis

These scenarios echo the sentiment of executives, who were asked how quickly they expect the OTTv services market to grow in the Middle East:

- Twenty-five percent believe growth will be between 10 and 25 percent per year, in line with scenario 1.
- Forty percent expect growth to be between 25 and 50 percent per year, consistent with scenario 2.
- Thirty-five percent say growth will exceed 50 percent annually, as in scenario 3.
- None believe growth will be less than 10 percent per year.

³ OTTv revenues refer to standalone OTTv subscriptions or pay-per-view services, such as live streaming or video on demand. OTTv access bundled with other services is categorized elsewhere.
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**Scenario 1: Niche OTTv market**

OTTv services remain a niche proposition and are largely positioned as a “free” add-on for pay TV subscribers. Pure OTTv providers fail to gain significant market traction because of their inability to acquire premium content rights. Piracy remains a major problem and inhibits consumers’ willingness to pay for additional video services. Linear television remains the main medium for video consumption.

The total value of the OTTv market reaches $62 million in 2020, coming in at 2 percent of the total television market. Thus, OTTv market share in the Middle East in 2020 is about half of its 2014 market share in the United States.

**Scenario 2: Moderate OTTv growth**

OTTv sees moderate adoption. OTTv providers with high-demand content similar to Netflix emerge, but challenges in distribution and in securing full access to premium content inhibit their ability to gain significant market share. Pay TV operators successfully market standalone OTTv services to expand their customer franchise beyond their core subscriber base. But in the absence of strong competition from OTTv service providers, they adopt a prudent commercial strategy to avoid cannibalizing their current business.

The total value of the OTTv market reaches $329 million in 2020, equivalent to 9 percent of the total television market.
Scenario 3: OTTv mass-market development

OTTv becomes a mass-market service. Service providers gain substantial access to premium content. In reaction, pay TV operators aggressively commercialize standalone OTTv services alongside their multiscreen packages. Broadcasters compete aggressively with a full range of live, catch-up, and video-on-demand services. Piracy is successfully tackled.

The total value of the OTTv market reaches $1 billion in 2020, or 25 percent of the television market—equivalent to its market share in the United States in that same year. In other words, the Middle East OTTv market will be almost as mature and developed as the U.S. market.

And the Winner Is ...

Asked which type of player is best positioned to win in the Middle East OTTv market, nearly 40 percent of the executives we surveyed cite standalone providers. But pay TV and telecom operators were also seen as serious competitors (see figure 8).

Figure 8
Predicted winners in OTTv

Who is best positioned to win in the OTTv services market?
(according to Middle East television industry executives; % of respondents)

![Predicted winners in OTTv](image_url)

Note: OTTv is over-the-top video.
Source: A.T. Kearney 2014 Middle East TV Executive Survey

In our opinion, the Middle East is unique, and lessons from other international markets might not apply entirely. The game is still open, and each type of player has unique assets to capitalize on and different strategies to consider (see figure 9 on page 10).

Direct-to-home satellite pay TV operators

Pay TV operators leave the gate with a strong position, thanks to their existing subscriber relationships and customer knowledge, multiplatform distribution capabilities, and access to
premium content. This provides the basis to cross-sell OTTv services to their customers and to heavily promote standalone, low-cost services to most of the population that today does not pay for content and is reluctant to commit to a long-term subscription. Sky Go in the United Kingdom has reached nearly three million active users, compared to its 10 million satellite TV subscribers. This service is combined with a portfolio of other digital properties, including news and information sites, fantasy sports, betting, and social media, to create a full digital ecosystem that supports its OTT offering. Sky also purchased a stake in Zeebox, a pioneering second-screen interactive application, to bolster its television and OTTv service.

The most difficult part for pay TV operators is to adopt a segmented strategy to maximize reach, but without encouraging customers to cannibalize the core business by cherry-picking content at a lower cost. Traditional pay TV will remain their main revenue driver for the foreseeable future, so pay TV operators need to focus on developing a portfolio of products that combines multiscreen subscription packages targeted at heavy-usage customers and OTTv-only packages for light-usage and lower-end customers.

And crucially, pay TV operators need to ensure competing OTTv services do not become a Trojan horse that causes them to lose exclusive rights over premium content.

**Telecom operators**

Telecom operators are eager to find new revenue streams, and cross-selling television and video services to their extensive customer base is a sterling opportunity. Telecom operators control the transmission networks, which gives them an edge in managing service quality and economics.
Indeed, most large telecom operators in the Middle East have already launched IPTV services and distribute pay TV channels from OSN and beIN SPORTS, among others. Some are already commercializing video-on-demand services over fixed broadband networks. Their IPTV boxes are already installed in many households, which gives them a natural gateway to control access to the large screen. In the United States, Verizon has gone one step further by providing OTT broadcasting over its mobile network. In 2014, Verizon offered its subscribers the Super Bowl over its own multicast LTE platform.

One challenge Middle East telecom operators face is lack of regional scale, as most are strong in only one country. Investments in IPTV platforms and content are substantial and would be more economically viable if made for a broader geographical reach.

As a result, telecom operators need to evaluate two very different alternatives: launching their own pan-regional OTTv platform or scaling down their IPTV investments by setting up partnerships.

**Standalone OTTv service providers**

The emergence of OTTv provides a window of opportunity for new players to enter the Middle East television market. These include both regional players such as icflix and global contenders such as Netflix, Amazon, and Apple.

Standalone providers have the advantage of being able to move quickly, without the constraints and cannibalization risks associated with a legacy television business. However, new entrants will need to invest heavily in content, branding, and customer and advertiser relationships to compete with the established pay TV operators and broadcasters. In addition, gaining access to premium content is likely to prove challenging, particularly for regional providers. For global players, on the other hand, their relationships and scale could be instrumental in encouraging rights owners to open up access to premium content.

There are also opportunities to innovate in content. First, a wealth of Arabic archive content is not yet available or monetized and could be acquired at a relatively low cost. Second, moving upstream to invest selectively in original programming or signing primary film deals, as Netflix did with the hit series *House of Cards* and its four-film deal with Adam Sandler, is costly and has risks but can create a major impact and help operators break into the market if well executed. Finally, investing in non-Arabic content to serve the many ethnic communities in the region can provide a differentiating position.

**Broadcasters**

Broadcasters such as MBC and Rotana can take advantage of their strong audiences and content rights ownership, and OTTv offers them the opportunity to increase viewship of their content. This is a growing trend globally. In the United States, 2014 saw the launch of HBO Go and CBS All Access, providing these broadcasters with direct access to consumers, bypassing their traditional pay TV operator partners. If they choose this route, the ability to monetize online audiences will be essential to avoid cannibalizing existing television advertising revenues.

With the possible exception of MBC, however, broadcasters may face a scale problem, as an OTTv platform offering a limited number of channels and narrow content will struggle to compete.

In this case, broadcasters would face two options: either partnering with a pay TV provider or OTT player to get their video service hosted on their platforms or joining forces with other broadcasters
to co-own a service distributed through their own and third-party platforms. Given the highly fragmented Middle East FTA market, the second option can work in this region. The success of Hulu in the United States and the attempt by the BBC, ITV, and Channel 4 to launch a similar service in the United Kingdom (though ultimately blocked by the regulator) vouch for the practicality of cooperative competition—or “co-opetition.”

The broadcasters’ strategy should consider linear live television and subscription-based video-on-demand services. However, the bias of FTA viewing toward entertainment series indicates potentially strong demand for a catch-up service. This is also supported by the huge success of the BBC iPlayer, which is used by four out of 10 online adults in the United Kingdom. The iPlayer is based on a seven-day catch-up service, which soon will be extended to 30 days.

Large broadcasters should also look for opportunities to monetize their extensive content, including deep archive material. MBC has been broadcasting since 1991 and ART since 1954. There is a wealth of historical Arabic content that could be digitized and made available on demand.

Finding the optimal commercial model is key. Consumers’ willingness to pay for content is low, especially for content that is on FTA channels. Therefore, stimulating the growth of online advertising will be vital—for example, by striking cross-platform advertising deals.

Prepare Today to Grow Tomorrow

OTTv has clear growth potential in the Middle East, but a number of conditions are required for it to fully develop. Consumers have an appetite for these services, so supply will be the main driving factor. Great content, multi-platform distribution, and an intuitive user interface are part of the recipe to secure consumer adoption. Industrywide collaboration to combat piracy, with regulatory support, and developing a targeted advertising platform are essential to establish a sound base for growth.

OTTv will likely take time to gain a foothold in the Middle East. Forward-thinking contenders will need to establish their positions now while also taking a long-term investment view. Although OTTv will revolutionize the way people view television in the long term, traditional pay TV and linear FTA will remain mainstream for the foreseeable future. Understanding and managing the consumption, content, and competitive dynamics of the market is the key challenge facing all players looking to win in the OTTv market.

Authors

Laurent Viviez, partner, Dubai
laurent.viviez@atkearney.com

Marc Biosca, partner, Dubai
marc.biosca@atkearney.com

Christophe Firth, principal, Dubai
christophe.firth@atkearney.com

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