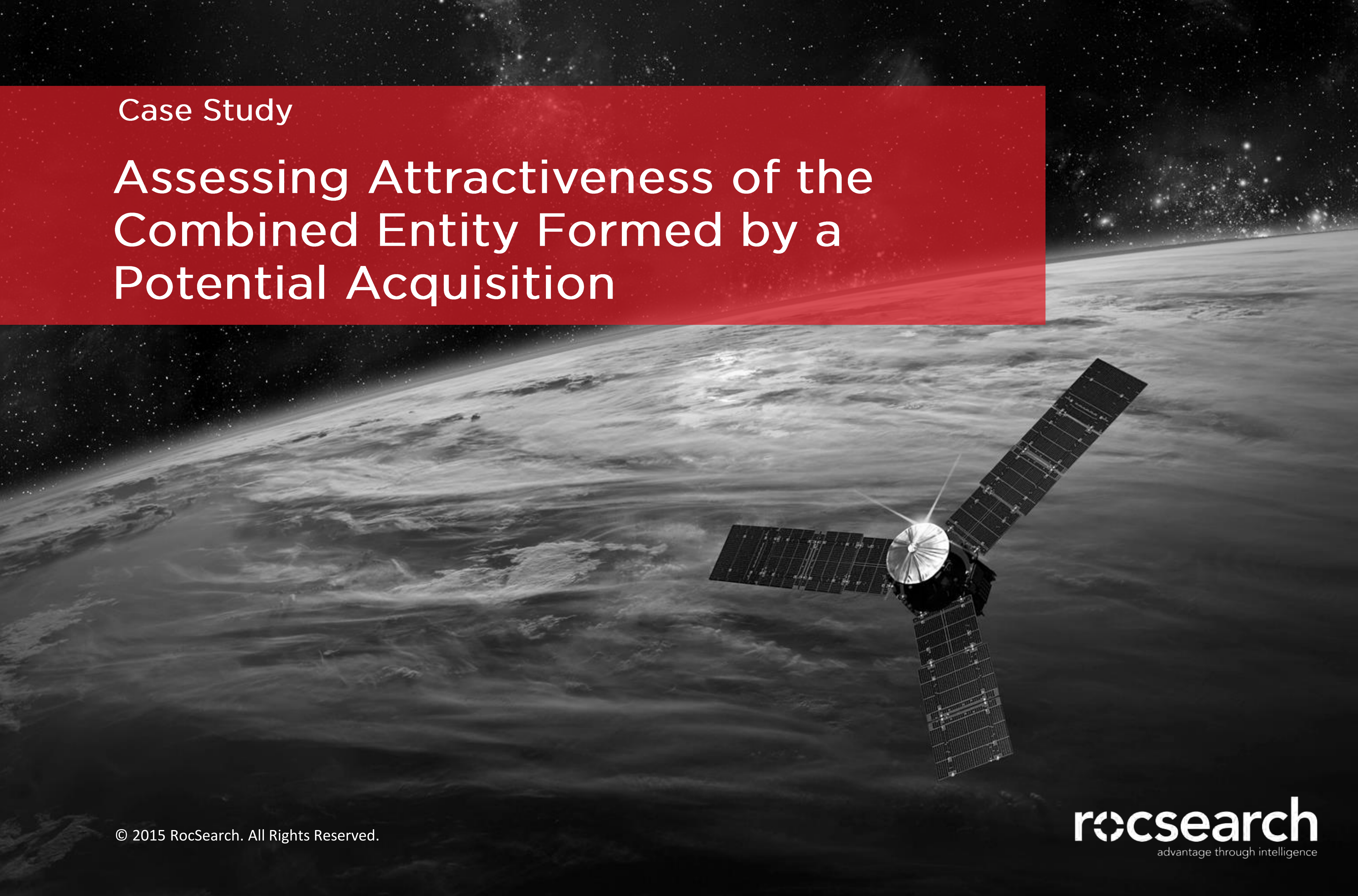
Case Study

Assessing Attractiveness of the Combined Entity Formed by a Potential Acquisition



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About the Client

- The client is a leading European telecom service provider

Business Objective

- The client wanted to augment its service portfolio with the addition of broadband services. They wanted to achieve this inorganically and had zeroed in on a company, which was under consideration for a proposed demerger with another at the time
- The client wanted to understand the target company's business profile, looking at its historical performance, future plans, and assess the attractiveness of the company as a standalone entity
- They also needed to understand the potential implications of the proposed demerger for the target company

Results & Value Add

The deliverable enabled our client to:

- Develop an understanding of the target company's historical performance and future plans, and form a view on its attractiveness as an acquisition target
- Assess the value of the company based on M&A broadband deal multiples in Europe
- Understand the potential pitfalls of the proposed demerger

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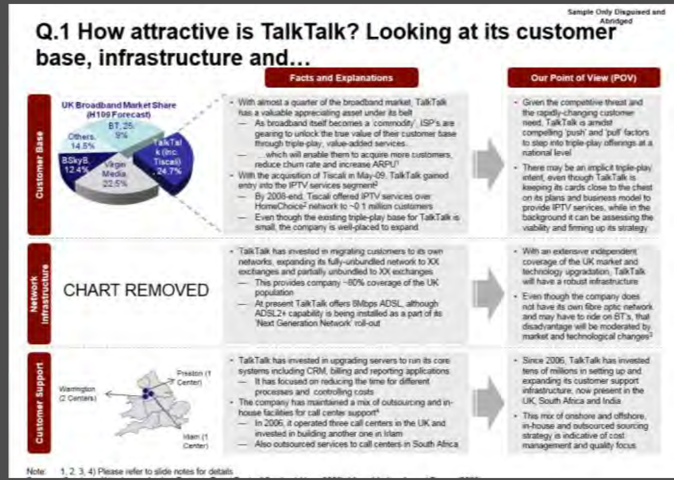
Research Methodology and Approach

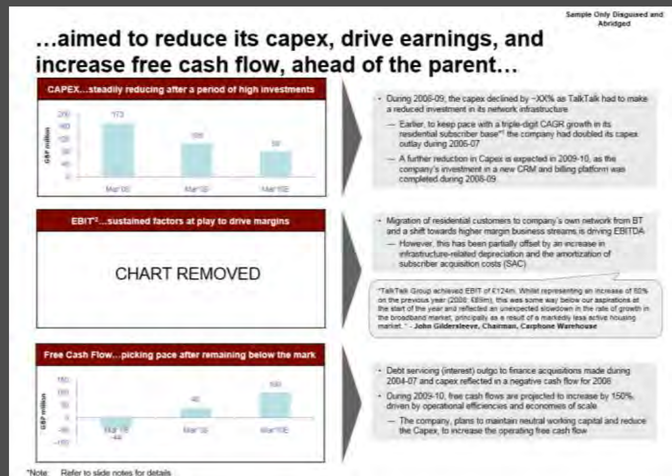
The study was divided into two phases:

- **Phase I**: Profiling the target company to look at:
  - Strategy employed by it for growing its subscriber base
  - Financial performance of the company
  - Operational performance of the company
  - Strategies and future growth plans

- **Phase II**: Attractiveness of the target company and implication of the proposed demerger:
  - Value assessment of the company
  - Potential risks of the demerger

Screenshots





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