

3RD QUARTER 2018

JOURNAL

106

REPRESENTING BROADCAST AND MEDIA TECHNOLOGY SUPPLIERS WORLDWIDE

Special Report:
**Driving the content
supply chain**

Also featuring
**Mike Crimp on
IBC2018**



**Creating a culture
of innovation**



Representing vendors globally across the
digital media and entertainment industry

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Ever onwards, ever upwards!



Peter White
CEO, IABM

Welcome to the IBC2018 edition of the IABM Journal. Looking down the contents list, it's once again jam-packed with insightful articles across a range of subjects that concern us all, as well as keeping you up to date with the latest developments and initiatives that IABM is undertaking to give members ever-better and more timely support and resources.

We have been busy working to set up regional Industry Advisory Boards as part of our drive to foster greater collaboration between IABM members and your end-user customers. I am pleased to report that the first one is now up and running in the UK, and you can learn more about it in Darren Whitehead's article on page 46. Expect announcements in other regions over the coming months.

Also just launched is our BaM™ Shop Window – a one stop portal for broadcast and media technology buyers hosted on the IABM website. There are already thousands of products listed on it (backed up with plenty of details and specifications) and that number is continuing to grow rapidly as companies of all sizes seize the opportunity for unparalleled exposure of their products and services to buyers.

We know the Shop Window will be warmly welcomed by technology buyers – over the last few years, it has become increasingly apparent that they simply do not have the time to trawl many disparate sources to find the products and services they need, and they asked us if we could help. The BaM™ Shop Window is our answer, and I am certain it will become the first stop for technology buyers.

We also welcome our new Director North America, Kathy Bienz, who has taken over the reins following a very successful four years' service by Caryn Cohen. Kathy brings a wealth of vendor-side experience – and contacts – to her new role. You can find out more about what Kathy has up her sleeve in our interview with her on page 58.

Our executive interview in this issue is – fittingly as we go into IBC – with Mike Crimp, IBC CEO. Mike updates us with what's new for IBC2018 and how IBC is responding to the influx of new players and new business models into broadcast and media.

On the subject of IBC, I'm also proud that IABM is this year collaborating with IBC on a brand-new initiative – the Future Trends Theatre, which will be curating throughout the show in the Future Zone. The IABM Future Trends Theatre will host a packed program of presentations that explore up-and-coming technology and business trends and how they will segue from today's environment. It's designed to give attendees an understanding of how new technologies can enable business plans now, rather than being dismissed as way-out ideas and possible hype waiting to find practical use cases. The Future Trends Theatre also looks beyond the horizon at new technologies that are not yet even on the broadcast and media radar.

Earlier this year, we introduced a new Business and Commercial Updates Section to the Journal, looking at broader issues which companies have to deal with beyond pure broadcast and media concerns – edited by our Finance Director, Lucinda Meek. This has been very well received by members and in this issue, we have some expert guidance on how to concentrate your efforts when considering registering trademarks, and also an article looking at how to create a culture of innovation within your company.

We introduced our new industry model – the BaM™ Content Chain: from Creator to Consumer – earlier this year in response to the fundamentally changed working of our industry – and the new relationship this is requiring between buyers and sellers of broadcast and media technology. Our feature article in this edition confirms that this was the right change at the right time. A wide range of members give their views on how the industry is changing and what the future will bring as it evolves into a true media factory.

Our now-traditional show opening Breakfast Session on Friday morning at IBC looks further into how the new Content Supply Chain will change our business forever, with a range of expert speakers from both the supply and buying sides of the industry. And we're rounding off Friday too – with a brand-new event: Unplug and Connect. We think this will be the premier networking event during IBC and will provide an ideal opportunity to network with colleagues, competitors, visitors and the wider industry in a fun and relaxing environment with drinks and music; a great opportunity to exchange views and ideas at the end of the first day of the show.

That's just a skim over what readers can expect in this issue. I look forward to meeting as many members as possible at IBC2018, and to hearing your feedback and ideas on what IABM can do for you. I wish all members a successful show – and don't forget the BaM™ Awards Party on Saturday evening – another prime networking opportunity!

A handwritten signature in black ink, appearing to read 'Peter White'.

Peter White
CEO, IABM



2018

Executive interview



Mike Crimp
CEO, IBC

As CEO of IBC, Mike Crimp leads a motivated team to ensure that IBC is a success for all stakeholders. With more than 30 years' experience in this industry, his background is in publishing and events. He holds an MBA from Leicester Business School specialising in marketing and business

Do you expect visitor numbers to hold up this year – NAB having seen a reduction of around 10% earlier in 2018?

I still believe people have a real need to meet, to talk face to face. In our industry we are dealing in extremely complex systems that use technology to drive creativity and commerce. It is not the sort of industry where a quick Google search will find an off-the-shelf product, so getting together with multiple potential partners, in the right environment to do business, is really valuable.

If you look at the structure of the media and entertainment business, we have a tiny handful of really big suppliers, a few middle-sized vendors, and a long, long tail of small, specialised and extremely valuable companies. This structure has been around for as long as I have been in the industry, and it works.

One of the reasons that it works is that it depends upon collaboration which naturally feeds innovation. IBC is a great place for those collaborations to be incubated.

Unlike some other exhibition organisers, IBC is not passive. We work hard to create an environment for knowledge exchange

and for business, helping exhibitors and visitors alike to plot their course through the latest in technology. We work to foster a sense of engagement across the global industry.

Our pre reg is 8% up on this time last year. So we are hopeful that will turn into attendees. Unlike other shows we publish the actual through the door attendance. Not the pre reg number.

What's new at IBC this year in terms of exhibition space, layout and features?

Before I answer that, it is important to say what is the same. We still have 15 exhibition halls full of all the players in this rapidly changing industry. That includes some new and exciting businesses, like the Alibaba Group, based in China, and the sixth largest internet company in the world.

Also the same since the first IBC 51 years ago is the recognition that our visitors are seeking knowledge. They rely on IBC to provide the forum for information exchange, on the show floor, in the conference, and in the value-added experiences and networking opportunities we create.

In turn, we are seeing exhibitors evolve in the way they present themselves. When IBC started, exhibitors were selling big devices: it was obvious what they did, and the captions alongside the big boxes talked in terms of technical specifications.

Today, large numbers of the products at IBC are software packages of some sort, whether running on dedicated hardware, standard computers or in the cloud. Exhibitors have to innovate to showcase their products and their unique selling points.

Smart exhibitors are finding new ways of telling their stories. We see many more putting theatres on their stands so they can present the philosophies behind their solutions, perhaps introducing users who have successfully adopted the technologies. It is all part of telling the story.

We are also very pleased to be working closely with the IABM. This year there will be an IABM Future Trends Theatre in the Future Zone which will host a packed programme of presentations that explore up-and-coming technology and business trends.

It seems an awfully long time ago that the direct link underground train route from the RAI to the city centre was started. Will it be up and running in time for this year's show – and if so, how do you think this will change the IBC visitor experience?

We are excited that the North-South metro line will finally be open. Now visitors will be able to get from central Amsterdam to the heart of the RAI in just a few minutes. It will be a great relief for those who dread the crowds on the number 4 tram, and it will slash journey times.

You have been working with IABM to introduce the new Future Trends theatre in the Future Zone at this year's show. What are your expectations for this?

The Future Zone brings together the very latest ideas, innovations and concept technologies from international industry and academia and showcases them in a single specially-curated area sitting alongside exhibition Hall 8. This year, the focus is on showing how new technologies grow from their first inception and progress through to research, development, and validation projects; right through to maturing into the ground-breaking applications and future product standards.

Major industry trail-blazers presenting their visions of the future, include Japan's NHK and BBC R&D from the UK. Both companies will demonstrate a number of technology advances, including: Web-VR applications; object-based media scenarios; pathways to 8K resolution for UHD; and Artificial Intelligence in broadcasting.

Another key component of IBC's Future Zone footprint is the IABM Future Trends Theatre. The packed programme of 60, 20-minute, presentations will explore up-and-coming technology and business trends and how they will segue from today's environment. We're looking forward to welcoming executives from companies including Hexaglobe, videomenthe, Prime Focus Technologies and Blue Lucy who will present on a range of topics including AI, cloud business models, new-age content supply chains, and blockchain.

IBC has been conducting extensive research around the length of the show. What are the conclusions?

IBC is always reviewing the format of the show to optimise the experience for visitors and exhibitors. As part of this continuous exercise, IBC recently completed two extensive pieces of research around the length of the show and preferences from both exhibitors and visitors.

The results demonstrate a high degree of uncertainty and neutrality around moving away from the current 5-day format of the show. As such, it has been decided that there was not enough evidence to support such a dramatic change to the format that has proved so successful for IBC over the years.

IBC is committed to maximising the value for exhibitors we are working on a number of exciting initiatives to add more value throughout the 5 days and in particular the last day on Tuesday which will be able to share more on post IBC2018.

The Telco & Media Innovation forum is new this year. What can delegates expect to learn?

IBC will host a new Telco and Media Innovation Forum, to expand our position as one of the preeminent destinations for telecoms and emerging technologies.

The dedicated Telco and Media Innovation Forum is designed for the leading players in the industry, and along with the new 'Smart Connectivity and Multiplay Devices' track within the IBC Conference Programme, will provide a platform for collaborative dialogue between telecoms providers, media players and the OTT sector.

Topics that will be covered in the Telco and Media Innovation Forum include:

- Bridging the gap between telcos and content providers: Fostering a new era of collaboration and scaling up to create the next generation of telcos
- Digitally transforming the telco: Examining how telecoms operators are revolutionizing the way they work and how services are being delivered to the consumer
- OTT Services and VoD: Where are the opportunities for telecom operators?
- Examining current market-wide issues impacting the telco evolution: Privacy, regulatory challenges and the impact of 5G on the digital divide
- Future Networks: Demystifying the 5G hype, the network evolution timeline, the impacts and where to invest

What other new initiatives are you introducing at IBC2018?

Another new initiative for IBC2018 is a partnership between IBC and MediaMatters, the Dutch-based platform that connects media companies with start-ups and scale-ups. On the final day of IBC2018, together we will host an exclusive '*Speed dating with startups at IBC*'.

The half-day event invites a select group of 15-20 innovative startups and scale-ups to present a short 2-minute pitch to a large audience of media executives from global media organizations including broadcasters, content owners and publishers on how their innovative solutions solve real business challenges. Following the pitch stage, media companies have the opportunity to connect with the start-ups and scale-ups to network and discuss potential business partnerships.

IBC is the pre-eminent conference and exhibition for start-ups and scale-ups to gain exposure and build lasting connections in the media and entertainment industry, so we're delighted to be working with MediaMatters to host this event and enable a forum to foster business relationships.

Tell us a bit about what we can learn from the conference this year – what are the themes being explored and discussed?

We have six tracks through the conference this year:

- new platforms: innovators and disruptors
- audiences: engage; influence; grow
- smart connectivity and multiplay devices

- advertising: the new attention economy
- cutting edge tech innovators
- Nextgen: interactive and immersive experiences.

Within each of these streams we have some big names who have pioneered new approaches and guided their businesses to successful achievements. For example, there will be keynote presentations from the likes of Kelly Day of Viacom, Neal Mohan of YouTube, JB Perrette of Discovery and former model and entrepreneur Lily Cole of Impossible.com.

Alongside these are some special events, including our popular Leaders' Forum and CTO-level days on cyber-security and the convergence of media and telecoms. Our Global Gamechangers day on Thursday brings together people and roles as diverse as Mohamed Abuagla, former CIO/CTO of Al Jazeera Media Network, and Peter Salmon, chief creative officer of Endemol Shine, the production company behind programmes as varied as *Black Mirror* and *MasterChef*.

We also have popular regulars like *What Caught My Eye* and the IBC Big Screen events. We cannot forget that the IBC Conference was founded on technical papers, and they remain absolutely central to the programme. This year, though, they are being woven more closely into broader sessions, so that the underlying technology is handled alongside the operational and business implications, putting all sides of the story in the same place.

The whole conference programme has been very carefully designed to tell a story, to guide the visitor through the whole IBC experience.

What advice would you give to exhibitors to ensure that they get the most out of the show?

One of the best ways exhibitors can make sure they get the most out of IBC2018 is to get the right meetings set-up in advance, which is really easy to do using the new IBC2018 app which includes the functionality to send meeting requests to other registered attendees.



IBC and IABM will help you identify the opportunities and threats through a daily schedule of informative sessions. It's all on the show floor and it's all free to attend

IABM to run Future Trends Theatre at IBC2018 Future Zone

IABM is curating the theatre in the IBC Future Zone at the IBC2018 Show. A new feature for IBC this year, the IABM Future Trends Theatre will host a packed programme of presentations that explore up-and-coming technology and business trends and how they will segue from today's environment.



The Future Trends Theatre is designed to give attendees an understanding of how new technologies can enable business plans now, rather than being dismissed as way-out ideas and possible hype waiting to find practical use cases. The Future Trends Theatre also looks beyond the horizon at new technologies that are not yet even on the broadcast and media radar.

As well as way-out-ahead topics, the programme will cover all the current hot trends, including:

- Artificial Intelligence
- The new media content chain
- The potential of VR
- Leveraging Social Media
- Virtualization
- Applications for Blockchain
- Targeted advertising
- Microservices
- Multi-platform publishing and delivery
- New business models unlocked by the cloud and other enabling technologies

The Future Trends Theatre will feature programme tracks to enable attendees to select the most appropriate sessions to align with their current needs, answering questions as to whether these new trends should be in their 2019 business plans and beyond.



IABM publishes Strategic Industry Analysis for IBC2018 attendees



Special Report from IABM's Business Intelligence Unit identifies key trends that are driving broadcast and media today

Our newly expanded Business Intelligence Unit has published a Strategic Industry Analysis for IBC2018 which gives an invaluable briefing on, and analysis of, the key trends that are driving change in the broadcast and media industry.

As well as being published in an interactive presentation on the IABM website, printed copies are available for members in our lounges as well as being distributed at our show-opening Breakfast Session (7.30am, Friday 14th September, The Forum) and the Leaders' Summit.

The report is divided into a number of sections: an overview of the industry; drivers of change; financial indicators; demand- and supply-side trends, with the former moving increasingly to 'build it yourself' solutions; content chain investment trends as the industry increasingly becomes a 'media factory'; and technology adoption trackers that show the current take-up and prospects for AI, cloud, AR/VR, UHD, IP and Blockchain.

The report concludes that the media industry is undergoing unprecedented change as a result of new entrants, new technology and new consumer expectations. The new media environment shaped by these forces has become highly competitive and traditional media companies are disrupting themselves to adapt. They are going direct-to-consumer, consolidating and demanding different technologies to be more agile and efficient. Media technology suppliers are disrupting themselves as well as they strive to keep abreast of the fast-changing media landscape; the future of content supply chains lies in data, automation and optimization.



IABM Expands Business Intelligence Unit

We have appointed two new Research Analysts – Riikka Koponen and Chiara Raucci, reporting to IABM Head of Insight and Analysis, Lorenzo Zanni. Both will join IABM in September, ready to meet with members and gain a deeper understanding of the industry at the IBC Show.

Riikka Koponen joins IABM as Principal Analyst and is a graduate of Helsinki School of Economics, Finland's top business school. She also studied Chinese Language and Literature at Fudan University in Shanghai, and is a fluent Finnish, English, French and Mandarin speaker.



**Riikka
Koponen**

Chiara Raucci joins as Research Analyst. She holds a Bachelor in Business Administration from Second University of Naples, and a Masters in International Business from Hult International Business School in San Francisco. Most recently, she has served as a data analyst and reporter for Tribe Dynamics in San Francisco, IABM's extensive business intelligence service is greatly valued by members, and the appointments of Riikka Koponen and Chiara Raucci are part of our plan to expand the range and depth of business-enhancing information we offer.



**Chiara
Raucci**



Internet delivery increasingly taking priority over traditional broadcast

Statistics and trends data repeatedly confirm that the Internet for many is the first choice for video consumption. Sure, there are variations among age groups and region, but the direction is clear. Many traditional broadcasters are in denial and risk doing too little, too late as the ultimate outcome approaches.



John Ive
Director Strategic Insight,
IABM

Depending on your point of view it's possible to argue the case for and against the health of traditional broadcasting: "World Cup 2018 TV viewing figures: In the UK incredible 23.6 million viewers tune in as England beat Colombia on penalties". This is truly an impressive number but a few high spots like this cannot sustain an entire broadcast service if other forms of programming are slipping away – as indeed they are.

So, what are the factors that we need to consider when attempting to see the way ahead? Here is the first dilemma: the viewers. Do they drive change, or do they follow change? There isn't a clear answer to this and the truth may lie between the two. It could be argued that viewers follow what they like – whether it's the program content or the way it is presented to them. If they are exposed to a new approach which they like, clearly that feedback will reinforce production of more of the same. And it's commonly assumed that the younger generation is more open to change.

The availability of low cost processing in the form of computers, tablets and phones with short-form video on demand has clearly sparked a positive reaction which has gone viral and made small screen, mobile short-form viewing popular. Strangely, the move to short-form was pretty much a necessity with the limitations of the Internet at its beginning but has now become the preferred option for many.

As ever, there is a selection process going on, which has successes and failures. Several years ago, manufacturers introduced hand-held portable TV receivers. If that had proved popular it might have gone viral as well, but it didn't. Sure, the viewing experience was not always the best but then neither was Internet video when first introduced.

So perhaps the first conclusion we can draw is that when exposed to new ideas, consumers can accelerate adoption dramatically or ignore them. The exposure to new ideas and judging success or failure is an important aspect of viewer evolution.

Timing is also key. Many great ideas have been too early or too late. Every good idea has its moment and very few get a second chance if the timing is wrong. In the case of Internet video, in all its various forms, the timing might have been trashed in the early days due to poor quality and unreliability, but rapid improvements, together with the growth of social networking and lifestyles that want increasingly to 'snack' on video made it the right moment.

Lack of momentum inherent in powerful incumbents can distort rational thinking and create a feeling of invincibility – think of Nokia, Blackberry and Philips here – added to which the early days of the Internet were easy to dismiss in terms of programming and technical quality. Maintaining an existing customer base also constrains freedom to innovate.

So many new trends start off as inferior to the norm and therefore easy to dismiss, followed by an extended period of denial, leading to incumbents not joining the trend or joining too late. You are invited to look around in your own region to see if there are examples of this! Importantly this is something that also applies to technology suppliers and consumer services. One famous technology provider enjoyed promoting and marketing their media technology as 'XXXX forever'. XXXX is intended to save embarrassment by identifying the company! In the event, they did a remarkable job of coming from behind very late and when, so obviously, new technology was already superseding it. Not all companies are that fortunate; 'Forever' does not exist in the world of

...beyond 2020 we should start to experience 5G from the Telcos and I'm sure they will be very happy to be serving up video in all its various forms

technology and consumer trends. So, returning the story back to today, where does this analysis leave us? Well, the foreseeable future (not forever) clearly favors the Internet; this is where the real innovation is happening. In terms of the initiative in video and program delivery and depending upon your region in the world, terrestrial was the pioneer of analog television and then digital, satellite was the first to embrace High Definition and now the Internet is the pioneer of UHD. Yes, you can get more UHD content through the Internet via on-demand than through any other traditional provider.

Because traditional broadcasters were slow to adopt Internet delivery and when they did, made it a poor second to their primary offering, they left the door wide open for new players to enter: the likes of Netflix, Google and Amazon to name but a few. So, they are coming from behind and in some cases have missed opportunities to capture some of the most compelling program content.

Well that is about to change with some traditional players deciding to put OTT and Internet delivery on an equal footing and perhaps even more radically, moving to an Internet first approach. There are still Internet negatives that need addressing but they won't hold back the 'tide' – there is no King Canute here!

One lingering issue is the ability to access all the potential viewers in a single country. In fact, public broadcasters often have the requirement to serve the entire population. This is yet another dangerous inhibitor. Private enterprises have no such mandate,

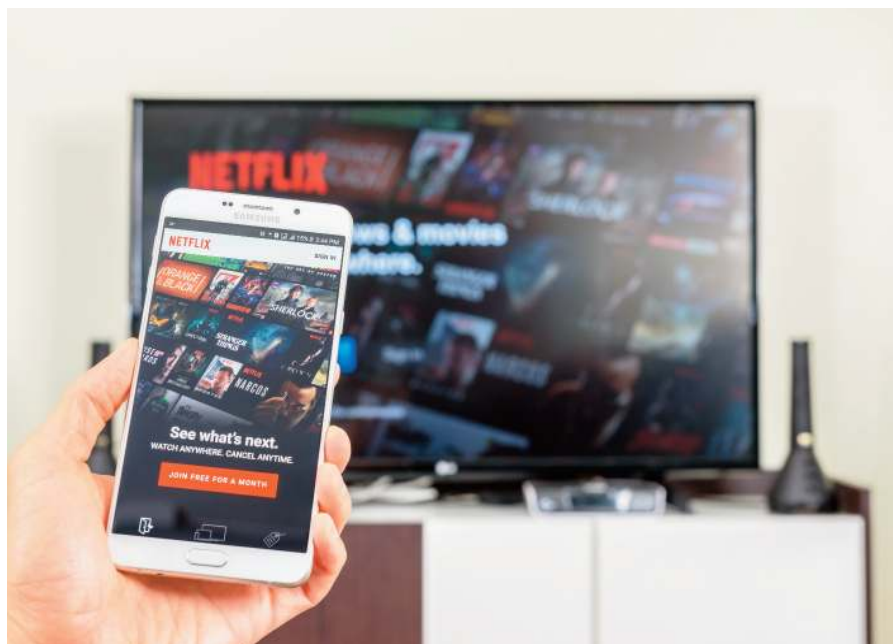
so if they can access 50% of the population (say) and turn a profit from subscribers then their business is viable and a threat.

Added to that, those same companies don't have the territorial restrictions commonly applied to public broadcasters, further strengthening their business model.

Broadcasters need more freedom to compete on a level playing ground if they are to survive. Technology over time will solve any outstanding limitations: the Internet already outperforms terrestrial broadcasting which in many countries is constrained by bandwidth and cannot convert all channels to HD.

Then beyond 2020 we should start to experience 5G from the Telcos and I'm sure they will be very happy to be serving up video in all its various forms. The hype currently exceeds the reality, much in the same way the Internet did in the early days (watching video was a frustrating experience!). The higher frequencies and short-range coverage may be an issue, but 5G could also be an opportunity to fill in gaps where wired Internet cannot reach. We can't be sure of that and in fact 5G may have an even more profound effect. Either way we just need to get used to the fact that it will be an 'Internet First' strategy that broadcasters need to adopt because the clock is ticking!

....that is about to change with some traditional players deciding to put OTT and Internet delivery on an equal footing and perhaps even more radically, moving to an Internet first approach. There are still Internet negatives that need addressing but they won't hold back the 'tide' – there is no King Canute here!



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Think differently. Act differently. Now.



Peter White
CEO, IABM

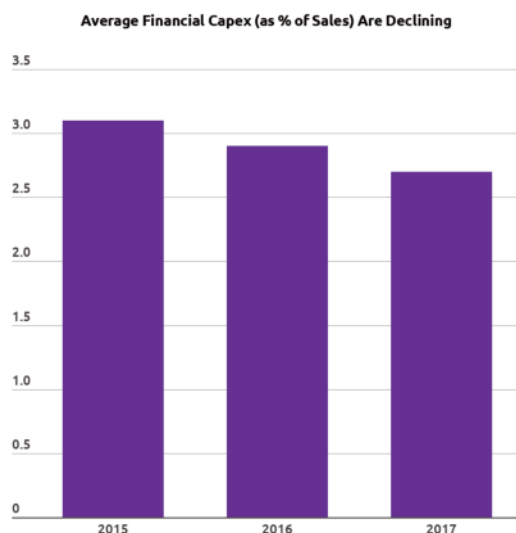
It's nearly six years since IABM's 2012 Annual Conference, which we headlined 'Adapt or die!'. Since then, we have seen not enough adaptation and as a result, too many companies consigned to oblivion. Change is now not an option – it's an absolute necessity for survival. Don't be frightened of it – embrace change by thinking differently and acting differently. You'll need to be brave and you will feel pain. Now for the good news: it'll be worth it. Let's have a look at what's going on and what we can do about it.

Change everywhere

The latest IABM Buying Trends Survey perfectly captures the current state of play – the continuing shift from hardware to software in most sectors of the industry, from bare metal to virtualized services that can be spun up instantly, and from forklift Capex to as-a-service and pay-as-you-go Opex. Efficiency is the number one priority of broadcasters as they battle to maintain revenues in an increasingly competitive and fractured marketplace.

This drive for efficiency is behind broadcasters' changing business models as they fight to counter the might of FAANG entering the media landscape and changing viewing habits, with consumers now driving the industry, demanding what they want, when and where they want it – and on which device. Technologies such as the cloud and AI are increasingly being tapped, not only in streamlining the content supply and delivery chain, but also helping in discovery of what is in demand with viewers – where to invest in content production.

From Capex to Opex



But Most Media Companies Are Increasing Their Media Tech Investment



Source: IABM

The overall size of the media technology market has remained largely static at about \$50 billion

Over 50% of broadcasters' capital expenditure on media technology is now spent with IT companies

More and more companies are no longer making huge one-off Capex investments, but instead are spending incrementally - upgrading each area and function discretely. According to IABM data, average financial Capex in the industry declined between 2015 and 2017 although general media technology investment has grown at most media companies – meaning that more money is being spent on Opex. Even though on-premise infrastructure should not disappear any time soon, media companies now require more flexible payment models from technology suppliers. This extends to technology integration, which is why 98% of them regard interoperability as a top priority; fully interoperable systems can be replaced or upgraded piecemeal, enabling companies to continue to develop to meet changing market needs without massive capital outlay. The financial model for the whole industry is changing, and this has impacted broadcast and media technology vendors heavily.

Painful but gainful

In the medium term, though, those vendors who have gone through the initial pain of losing large but unpredictable Capex injections and adapted to changing business models will benefit. Predictable, regular income streams from as-a-service offerings means the end of feast-or-famine, enabling businesses to plan better and, of course, increase stakeholder confidence. While pay-as-you-go revenues from services that can be called on as required are by their nature less predictable, over the course of a few months a pattern will build, and a degree of planning

certainty will accrue – with more confidence than capricious one-off purchases which may or may not come about for a variety of reasons – competition, delayed budgets, etc.

I mentioned pain earlier, and this business model transition will undoubtedly initially hurt media technology vendors; a one-off income of \$5 million compared with say \$100K a month will take over four years to match, but once this point is reached, the future instantly looks much more stable and predictable.

Improved margins

The 2018 IABM DC Global Market Valuation and Strategy report (GMVR) has just been released, and the overall size of the media technology market has remained largely static at about \$50 billion. As the balance between hardware and software sales continues to move to the latter, the overall value of the industry may reduce as a result over time. However, software – with no expensive materials or assembly facility – generally commands a higher margin than hardware, so although overall revenues may be down, profitability will increase. Margins on many hardware products will also be further eroded

as more and more functionality moves onto COTS hardware. According to the Buying Trends survey, over 50% of broadcasters' capital expenditure on media technology is now spent with IT companies – not traditional broadcast suppliers.

In-house solutions on the rise

There's another growing trend uncovered by the Buying Trends survey: media companies are developing more and more solutions in-house – up to 37% in the latest edition. Put simply, what they need to keep their businesses agile, flexible and growing is not available off-the-shelf, so media companies are using components in the cloud, leveraging APIs and microservices. There is of course still a prominent role for broadcast and media technology vendors in this process, applying their specialist expertise and understanding of media workflows to enable these solutions. But this new way of working is also requiring a new relationship between technology vendors and buyers – a move from transactional selling to collaboration: working together to solve the media company's problem.

More In-House Builds

Media Companies Are Planning To Increase Their Internal Development Capabilities

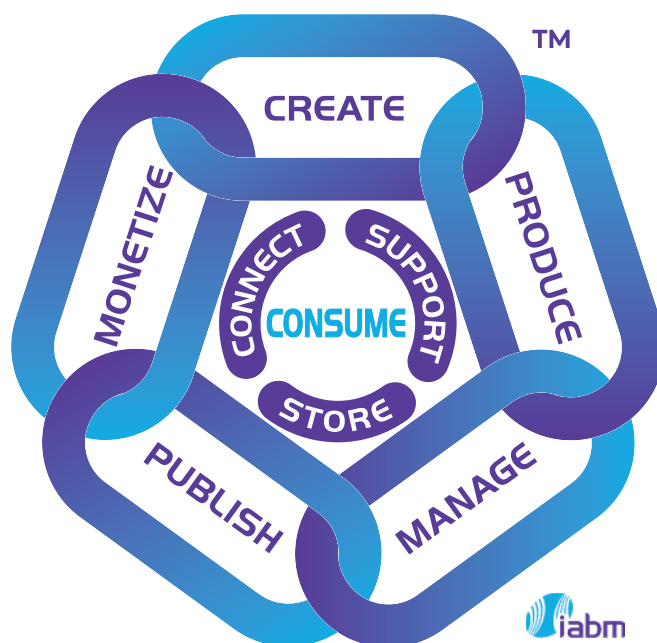


● Solutions Sourced Internally
● Solutions Sourced Externally



● Increasing Investment in Software Development

About 20% of jobs would be automated over the next 20 years and no sector would be unaffected



THE BaM™ CONTENT CHAIN

from Creator to Consumer

Changing the game

In response to this blurring of lines in both the buyer-seller relationship and the move from point-products to workflow-wide solutions, IABM has launched two major initiatives to help the industry forward. The first is the BaM™ Content Chain – a new industry model based on the creative, operational, economic and technical activities supporting the content supply chain: mapping how a piece of content gets from camera to consumer, or ‘glass to glass’. The BaM™ Content Chain describes the industry in the same way that broadcast and media companies themselves think, using the same terminology. It embraces the huge transformation in the industry away from a hardware-based linear world, to a multi-platform environment, software, virtualization and the cloud.

The BaM™ Content Chain provides technology and service providers with three essential economic benefits:

- It builds a common understanding between suppliers and users of the creative, technical and economic activities in the broadcast and media industry, enabling innovation to be tracked and understood and creating a blueprint for building a modern content supply chain.
- It underpins the valuation of the addressable market for technology products and services, with each link mapping to a typical buying organization.
- It enables discovery of technology solutions and services by broadcast and media companies, demonstrating clearly which products fit which niche.

The second IABM initiative is the launch of regional Industry Advisory Boards (IABs), bringing together buyers and vendors of broadcast and media technology to keep ahead of the growing complexity of requirements, rapidly changing business models and onrush of new technologies – reaping huge rewards for their businesses. It is IABM's strong belief that only by uniting both ends of the industry can we all truly prosper and successfully navigate the structural transformation our industry is going through right now.

Change people

The biggest barrier to transformational change is often not technology or business models – it is people. The inability to accept change and be agile is why large companies fail. To make change successful, you have to start with the mindset of the people in your organization; ‘because we’ve always done it this way’ is a recipe for disaster – as is people fearing for their jobs.

The fact is that many of the jobs people used to do are no longer relevant, and it is inevitable that in streamlining companies to make them lean, fast and agile by tapping new technologies, some jobs will have to go. But by being open-minded, retraining and learning new skills, new opportunities open up, which will often bring greater satisfaction and engagement.

Why employ a whole department to handle transcoding or localization when you can train a machine to do it faster and more efficiently, for example? Much better for the people – and the business – to redeploy them to more creative tasks.

The broadcast and media industry is not alone in this need to retrain and redeploy people. A recent report from PricewaterhouseCoopers argued that AI would create slightly more jobs (7.2m) in the UK than it displaced (7m) by boosting economic growth. The firm estimated about 20% of jobs would be automated over the next 20 years and no sector would be unaffected.

Stick to what you’re good at

Outsourcing is seen by some as a dirty word – largely due to some catastrophic choices of suppliers and frankly daft contract terms – particularly in the public sector. However, successful companies continue to be successful by sticking to what they’re good at – their core competencies: concentrating all their efforts on what their business is about. If you need something doing and it’s not one of your core competencies, outsource it to an organization whose core competence it is. That way, you can continue to develop your business rather than reinventing the wheel. This sounds so obvious, but the number of companies who have taken their eye off the ball and failed as a result is frightening.

Conclusion

In summary, we all need to think differently and act differently. Here’s a checklist:

- Take the pain now – change your business model and expectations to meet your customers’ operational needs
- Move from hardware to software where possible for better ROI and customer relevance
- Tap into new technologies to deliver the agility, flexibility and efficiency your customers need
- Embrace collaboration – work with your customers to deliver creative solutions
- We’re better together – participate in forums such as Industry Advisory Boards to plot a successful future
- Understand the new content chain – how everything interacts and interoperates
- Stick to what you’re good at – core competence strategy
- Take your people with you – retrain, redeploy, share success

And finally, remember that complacency kills companies. If it’s not broken, consider breaking it now before it’s too late. The status quo is not an option – adapt or die!

BOOK TODAY!



iabm ANNUAL INTERNATIONAL BUSINESS CONFERENCE & AWARDS 2018

Booking is now open for the IABM 2018 Annual International Business Conference & Awards, which will take place at a new venue this year - the Birmingham Metropole Hotel in the UK on 6th and 7th December. Under the banner 'The Future of the Content Supply Chain', the conference will map out how the broadcast and media industry - and the technology that powers it - will evolve across four major themes:

- **Why We Built It Ourselves:** more and more broadcast and media companies are taking the lead in developing their own content supply chain solutions, completely changing their relationship with technology vendors. Case studies include a European broadcaster's radical new approach to MAM, and Médias du Sud reinventing live news in France.
- **Transformational Technology:** new tech is changing the face of the media and entertainment business. We meet two of the leading content Blockchain pioneers - Eluvio and JAAK, ask whether AI is more than marketing hype, and look at the future of sport with virtualized remote production.
- **New Revenues, New Business Models:** as established media revenues come under threat from the digital FAANGs it's time to fight back with new approaches to ad tech and subscriptions - and paying for the enabling technology. Insights from Imagine Communications, BASE Media Cloud and YellowDog.
- **New Media:** the rise and rise of OTT is spawning an entirely new generation of disruptive digital media businesses that are connecting content and brands to consumers in completely new ways. Hear how these new players change the game in the way they run their content supply chain.

As with the 2017 conference, quick-fire content will be king - presentations and panels will cut straight to the cutting-edge issues that are crucial to the future of our industry with engaging and fun presentations, given by expert and engaging speakers.





iabm ANNUAL INTERNATIONAL BUSINESS CONFERENCE & AWARDS 2018

Hilton Birmingham Metropole, Birmingham UK
6-7 December 2018

Future of the Content Supply Chain.
Efficiency. Automation. Intelligence.

- **AI Hackfest** – developer teams compete to build a new AI-enabled media content tool in 24 hours. Delegates vote on the winner and share in their innovation.
- **Solution Speed Dating** – technology and service suppliers speed-date broadcast and media company leaders to find the perfect match between upcoming projects and innovative solutions.
- **Business of Broadcast and Media** – focusing on changing business models, new media and new ways of buying and deploying technology.

The 2018 conference also sees the return of hugely popular Dragons' Den and Real-World Case Studies that debuted at the 2017 event.

Perhaps most importantly, the conference will offer excellent opportunities for collaboration and networking in an informal, relaxed setting, giving delegates more chance than ever to make new connections at the only event where broadcast and media companies work collaboratively with technology and service providers to solve the challenges ahead.

During the gala dinner on the evening of 6th December, the winners of IABM's prestigious Annual Awards will be announced, including the Peter Wayne Golden BaM™, given to the overall winner judged across the 2018 BaM™ Awards at NAB Show and IBC.

"All the feedback from the new-look 2017 conference was extremely positive," said Peter White, IABM CEO. "So, following our principle that if it isn't broken then it probably needs to be to survive and thrive, we have once again changed things up for the 2018 event – in terms of venue, theme and the addition of more exciting new features that tackle today's challenges head-on. It's certain to be a stimulating conference with plenty of business-enhancing learning opportunities for delegates.

Book your place at www.iabmannualconference.com

BaM™
AWARDS 2018



The background of the slide is an abstract composition of light streaks. The top half features a dark blue background with lighter blue and white streaks radiating from the top right corner. The bottom half is a lighter blue background with streaks of orange and yellow light radiating from the bottom right corner. The text is centered in the middle of the slide.

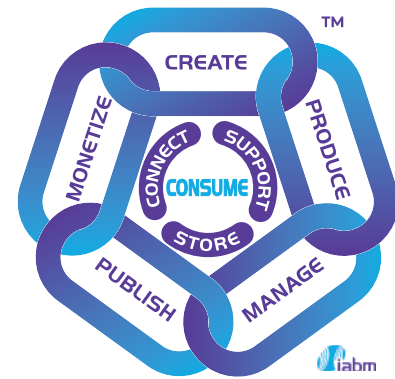
The road ahead...

"A continued drive towards subscription models;
cloud-based virtual appliances and workflows; and
all-IP production and distribution."

Lewis Kirkaldie, Cinegy

Driving the content supply chain:

How IABM members
are facilitating the new
media factory



THE **BaM** CONTENT CHAIN from **Creator** to **Consumer**

Earlier this year, IABM unveiled the results of a major project to provide a new model to reflect how the industry works today. In just a few years, the industry has moved on almost unrecognizably, which is why we set about researching and constructing the new model which would not only reflect the way the industry is today, but also accommodate future developments and changes.

The result is the new IABM BaM™ Content Chain: from Creator to Consumer. The BaM™ Content Chain moves away from an inward-focused, product-centric view of the broadcast and media business, to one based on the creative, operational, economic and technical activities supporting the content supply chain: mapping how a piece of content gets from creator to consumer. It describes the industry in the same way that broadcast and media companies themselves think, using the same terminology.

We asked a number of IABM member companies to tell us how they are adapting to broadcast and media end-users' new 'media factory' approach that has given rise to the BaM™ Content Chain, how their products and services work across and within the chain, and what they see coming next.

Integrating the content supply chain

First, we asked respondents how they are helping their customers achieve greater integration across the content supply chain. Three overarching themes emerged – easy connectivity through APIs, removing the need to move media from one part of the chain to another, and automation to enable mapping (and so control) of complete, end-to-end workflows. Pervading all was a recognition that no one company has all the answers any more, and collaboration is key to success today.

Keeping it in the cloud

Amazon Web Services (AWS) delivers IT resources on-demand via the Internet with pay-as-you-go pricing. "We provide the AWS Identity and Access Management (IAM) service that enables customers to create and manage user groups based on permissions," says Niall Duffy, AWS Media and Entertainment, Partner Lead.

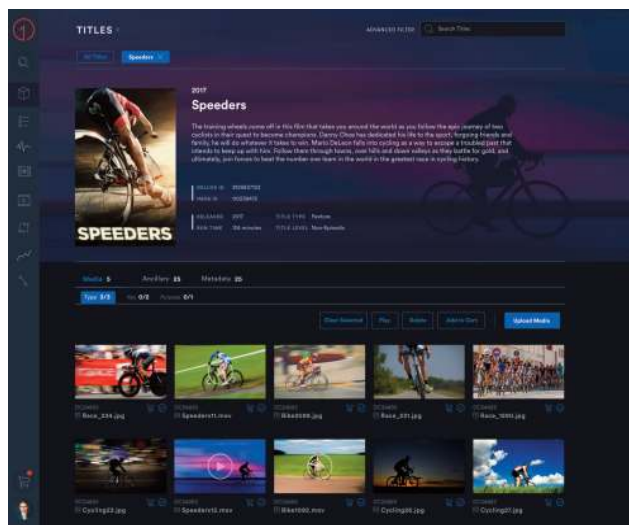
"These groups can include authorized 3rd parties so you could have a content organization that keeps content in place in its AWS account and enables other service providers, such as compliance, post-production or distribution services to use that content without having to move it. For a media supply chain, this has the obvious advantage of reducing the transfer of high bit rate content between service providers throughout the value chain. UKTV is a good example of a media organization in Europe who is utilizing this feature, working with partners such as M2A, Mediasmiths, and Vidispine to build a next-generation media supply chain," Duffy adds.

...We reimagined what was a highly fragmented content chain, unifying those services in the cloud, to reduce complexity and increase automation and efficiency

Vidispine's business is centered on its API-based media asset management platform. Marketing Manager, Patrik Malmberg, explains his company's part in this integration: "The Vidispine API is the center of the Vidispine ecosystem. It gives developers access to advanced metadata handling, storage management, essence management, and integration to any third-party service. The API supports native integration with services across the content supply chain, as well as API integration with support services such as DRM and workflow engines. The extensive API in itself makes it easy to build and maintain integrations by being forward compatible...and is built using standards as far as possible, making it easy to integrate into any external service also adhering to standards."



The cloud also underpins Deluxe's approach to integration. "Deluxe One allows content owners to manage, publish, and monetize their content – all in one place," says Morgan Fiumi, Chief Innovation Officer at Deluxe. "With Deluxe One, we reimagined what was a highly fragmented content chain, unifying those services in the cloud, to reduce complexity and increase automation and efficiency. We partner closely with customers to determine their goals, integrate their requirements, and automate their workflows within Deluxe One. Ease of integration with existing operational systems and customer-preferred vendors is further enabled via APIs to the Deluxe One platform. The platform's open architecture provides greater interconnectivity across the supply chain, allowing not only customers, but other vendors, to connect their business, making services from other leading industry providers easily accessible from one destination."



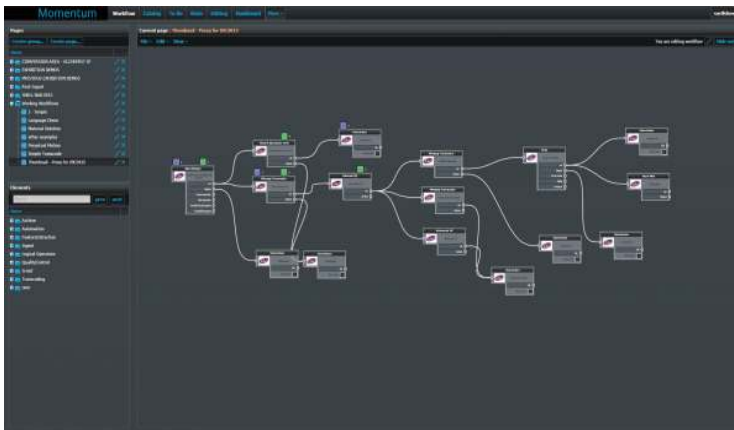
...We have been broadening our definition of automation for some time, looking at it in the context of the broader supply chain

Greater efficiency through automation

Whether it's making cars or delivering media to consumers, automation and efficiency underpin any successful factory operation. "Automation is the key to integration, and Cinegy provides tools and experience in mapping content and metadata between their respective sources and destinations. We provide not just a destination, but a choice of routes to get there," says Lewis Kirkaldie, Head of Product Management at Cinegy.

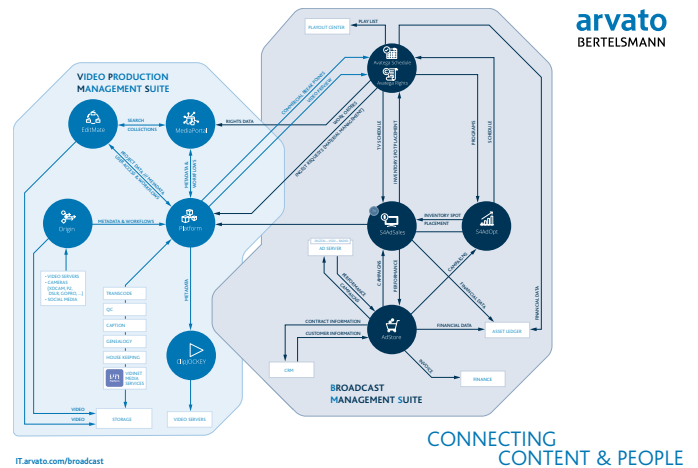


Grass Valley's VP Global Marketing, Neil Maycock, also sees automation as central: "We have been broadening our definition of automation for some time, looking at it in the context of the broader supply chain. A good example is the Momentum solution, which enables customers to automate media processes and link them within the supply chain, mapping their business processes into the workflow. It delivers a hugely flexible and responsive approach to managing assets and creating greater operational efficiency."



Taking collaboration to the next level

Arvato Systems offers a range of products and services across MAM, PAM, IP/rights management, cross-media scheduling, ad sales and ad/promo placement optimization and automation. Portfolio Manager, Ben Davenport, emphasizes the importance of collaboration in delivering a successful integrated supply chain, and sees further benefits of this approach too. "A big focus for us in the last 18 months has been 'ecosystem' – how do we connect to all the things we 'touch' and beyond?" he says. "This has led us to find different approaches to how we partner with other vendors and end-users. As



an example, some years ago, a vendor would sell a product or system (off-the-shelf or custom) to the 'customer'; today this still happens, of course, but an alternative might be co-developing a solution in partnership with end-users and other vendors and entering into a revenue sharing agreement on the result, directly tying our success to that of our 'customer'."

Collaboration is also a keystone of VSN's approach; the company offers advanced software solutions to solve the needs of media and content creation, distribution and management across the entire media lifecycle. "VSN is well-known for its open, agnostic and above all, very flexible solutions when it comes to integrating with third-party systems, if necessary, to make them 'fit' within an already designed and implemented workflow," says Patricia Corral, VSN Marketing Director. "Both partners and customers praise our ability to develop powerful and very efficient integrations in a spectacularly fast way - we have even been said to develop better integrations with third-party systems than manufacturers themselves achieve with their own systems."

Crystal's products sit at the point of playout and distribution and are focused on ensuring that content continues to flow, and by their nature have to be highly integrated. "Our solutions are software-based and platform agnostic, meaning they can easily integrate with other parts of the chain. We also work closely with a number of partners to tightly integrate our solutions," says Roger Franklin, Crystal



CEO. “More and more broadcasters are realizing the potential to increase monetization by dynamically replacing ads for other reasons, whether that is individual personalization or to tie in with specific local events. With linear ads being a wide variety of lengths, this is not as easy as it may seem and often leads to simple slate screens where an ad once was. Our technology means that broadcasters can easily replace ads with another of exactly the same length, meaning a seamless viewing experience for the consumer and a wealth of opportunities to personalize the ads. Of course, this also means that advertisers are much more likely to pay for ads.”

Moving media?

KnoxMediaHub (KMH) also solves the problem of needing to move media between operations by offering a complete cloud platform, where it says all media companies, content producers, post production studios, distribution platforms and broadcasters can host their content and execute most of their related business and technical operations. “KMH provides the ideal processing location where content has no need to move from one location to another. All operations and transformations of content can be performed with just a click. It provides the ultimate stage of end-to-end integration with the highest possible degree of automation,” says Daimon Hall, International Sales Director at KMH.



A complete Cloud Toolkit for all Media Players



Even in the most integrated supply chain, files still need to move – in terms of the BaM™ Content Chain, to Connect – and when they do, Signiant’s intelligent file movement software is the choice of many leading companies. “Signiant’s simple yet powerful product

... our solutions are software-based and platform agnostic, meaning they can easily integrate with other parts of the chain.

portfolio includes three products that cover nearly every file transfer use case in the industry,” says Managing Director of EMEA/APAC, Greg Hoskin. “All companies in the content chain require easy, secure ways to move large files and that is exactly what Signiant provides. Signiant supports modern global media operations through moving file-based content between facilities, people and into and out of cloud services. Vital for today’s large files, network conditions and long-distant transfers, Signiant’s core acceleration technology provides fast and reliable movement throughout the life cycle of media files, from production and post-production to distribution and archives.”



Data drives everything

All the content in the world is no use if you can’t describe it, find it and monetize it with consumers. That’s why data is increasingly at the heart of every content supply chain. And it’s not only data about the content itself that matters – but also data to improve workflows, and data about the end-consumer to drive content targeting and success too.

Informing business decisions

“The Big Data revolution is here to stay in the broadcast and media industry,” says VSN’s Patricia Corral. “Only this way will professionals be able to perform detailed analysis of their resources’ performance, while evaluating which content and processes are generating a greater return on investment, based on the ever-changing trends and interests of the audience.

“In our case, aware of the importance of data and its correct analysis to make well-founded strategic decisions, we have created a Business Intelligence module for our VSNE Explorer platform for media and business process management. Basically, this module is able to transform all the metadata of stored media into analytical information that brings real value to the company. It can extract information from the assets, quality of the media, traffic, transcoding and from other series of processes, including third-party systems as well, to subsequently present all this information in simple graphs and analytical reports that can even be compared to each other. Companies can rely on these reports to make decisions and analyze the performance of their businesses, without having to carry out this task manually or acquire additional third-party systems to do it.”

Targeting audiences

Arvato Systems' Ben Davenport concurs, and sees data playing an important role at the consumer sharp-end too. "We see AI, and the metadata it creates, at many different parts of the content chain. As the accuracy of that data increases, that data becomes useful in terms of automating processes – including the automated scheduling of tertiary and/or personalized programming. One of our highlights for IBC will be looking at how we can use detailed audience data to enable automated ad-placement optimization. While the first half of the decade saw a big shift towards 'digital' advertising and the ability to control reach and frequency on web and social media, events in the last few years have seen a number of high-profile advertisers swing back to the 'brand safe' environment of television. For the first time, by combining automation, optimization algorithms and large data sets, we are able to give end-users control over reach and frequency and reduce 'waste' within that brand safe TV platform."

Crystal's Roger Franklin also sees data as playing a critical role across the supply chain. "Data and metadata are key elements in the future of TV video. Our solutions are able to automatically extract metadata, insert markers, and turn metadata into something which is extremely actionable. Crystal Connect, VidTime, and Metadata Cloud are focused on ensuring the right data and metadata are communicated from the broadcaster to the distributor or the viewing device frame-accurately."

AWS has data services very much at the core of its business. "We provide platform services that can be used for the ingest and management of large datasets and for analyzing data," says AWS' Niall Duffy. "These services are either used by customers themselves, or with partners for the provision of more specific services. In media, some of those services are in managing customer viewing and behavior data and specifically in providing recommendation engines. AWS partners such as ThinkAnalytics utilize AWS tools with TV and Video operators like Proximus, BBC, and Telstra to provide customer lifecycle management around personalized content discovery, navigation and viewer analytics. Other partners, such as Piksel, have built OTT SaaS offerings on AWS, that provide an enterprise view of metadata, from operations to end viewers for content organizations such as Liberty Global and OSN."

Vidispine too has data at the heart of its solution. "In

Vidispine's core product, the Vidispine API, advanced metadata handling is one of the cornerstones of the offering. With a simple yet powerful data model and a metadata-driven philosophy, the Vidispine API allows developers to specify multiple generic and configurable metadata models in the same repository, capturing all information you need on any object in the database. The metadata granularity spans from repository level down to objects in a video frame, giving you perfect control over all content. The model uses datasets that define semantic relations between metadata values, using standard RDF documents. The datasets can then be used to validate the metadata in the system, making it easy to apply already existing models inside Vidispine."

AI will continue to play an ever-growing role in turning data into actionable decisions according to KMH's Daimon Hall. "The provision of an extremely open and accessible metadata management system allows the ingest, editing and output of data from and to any source. Moreover, we believe in Artificial Intelligence for more advanced metadata generation. Also, as partners of IBM Watson, we are working on the integration of their Artificial Intelligence engine."

Keeping it clean

While Grass Valley is not directly involved with data management, it understands the value of clean and full data to its customers. "What we do focus on is data preservation, which is increasingly critical for media organizations as they implement greater operational efficiency, but also seek to maximize the value of their assets," says Neil Maycock. "A lot of data, which can often serve as the 'recipe' of how a flat piece of content was put together, has been typically discarded in traditional broadcast processes."

"We are now implementing workflows with the AAF file interchange format which 'unflattens' content, preserving data throughout the creative process. Additionally, our media management solutions have extensible data models, with a core set of metadata that is used throughout the workflow. Customers can amend and augment the metadata to preserve the information they want through the workflow."

Efficiency – the holy grail

One of the cornerstones of any factory is efficiency, and the media factory, with its content supply chain, is no different. How are vendors supporting broadcast and media companies' efforts in this business-critical area?

"The efficiency of the supply chain across the whole industry has become absolutely critical, as the sales margins are falling significantly and will never go back to the old levels (as happened to the automobile industry 25 years ago). This is one of the pillars for the existence of KMH," says Daimon Hall.

More for less

Arvato Systems' Ben Davenport sees automation as key to efficiency gains. "To increase efficiency, you need to reduce waste and/or increase output for the same cost. Cost is a key word here as cost, or value aware, automation enables more targeted efficiency – as that automation and 'assist' can ensure utilization of more valuable rights or scale processing according to cost, but only when there will be an appropriate return. Automation can also be used to drive effectiveness – for example, by evaluating different scenarios in terms of ad or promo placement and scheduling and finding the most optimal result."

Automation can also be used to drive effectiveness – for example, by evaluating different scenarios in terms of ad or promo placement and scheduling and finding the most optimal result.

Automation is also key for Crystal. "Efficiency improvements are increasingly important as competition increases," says CEO Roger Franklin. "I've always said that the industry needs to automate as much as possible. Not only does that make processes faster, it also greatly reduces errors, maximizing efficiency. Our solutions are all about automating as many processes as possible and flagging up any errors or potential errors early so that they can be dealt with before the feed is affected."

For Grass Valley's Neil Maycock, there are more gains to be had beyond those delivered by automation. "It's not just automation that brings in greater efficiency. Workflows also need to do more without requiring additional headcount and resourcing. As media companies increasingly have to support content delivery to multiple platforms, automating previously labor-intensive processes is the only viable way to accommodate these new services. Additionally, broadcasters now need to support multiple resolutions within the live event production workflow – simultaneously delivering HDR, UHD and HD feeds. And,

Thomson Reuters used AWS Step Functions and AWS Lambda to automate the transcoding of daily news clips into distribution formats, reducing processing time from 20 mins to 2 mins

all this has to be done off a single creative process. With our switchers, an operator can cut the program once, while the switcher processes it in the various formats that are required.

"While asset management and moving files around in an automated way does drive workflow efficiency, there is still much more that can be done. Producing three flavors of a piece of content shouldn't mean you need three times the number of people working on it. The systems and the workflow should handle these aspects, allowing the operator to focus on the job they are there to do," Maycock adds.

End-to-end

"Automation and optimization are inherent components of AWS cloud infrastructure, with tools such as AWS CloudFormation for automating provision in AWS and AWS Lambda and AWS Step Functions for triggering automated workflows," adds AWS' Niall Duffy – and he has plenty of real-life examples to illustrate this. "Partners such as SDVI have worked with Turner International to utilize these technologies to streamline their end-to-end content workflow and move them into AWS. A core part of the Turner migration to cloud was a business case based on reducing the Total Cost of Ownership (TCO) as well as being able to support a more flexible business model. 21st Century Fox has created its Media Supply Chain on AWS, which acts as a media processing factory for the receipt of content, metadata enhancement, compliance, and distribution. Thomson Reuters used AWS Step Functions and AWS Lambda to automate the transcoding of daily news clips into distribution formats, reducing processing time from 20 mins to 2 mins."

Agility – matching supply with demand

While efficiency is key to an effective content supply chain, today broadcast and media companies also need to be able to instantly scale their operations to match the continuous cycle of spikes and troughs in demand as ever-more fickle audiences flip-flop between different platforms and content. This has implications beyond just flexible resourcing – it is also changing business models at end-users – which in turn requires technology suppliers to change theirs too.

AWS is the cloud platform of choice for a significant proportion of media and broadcast companies. "We provide the underlying infrastructure that enables the provision of all of the components of the BaM™ content supply chain model," says AWS' Niall Duffy. "Cloud

infrastructure is particularly relevant to content supply chain management because the requirement for collaboration, and in some cases global collaboration, and the need to support peaky workloads (e.g., large ingest, transcoding, or processing jobs) align well to the core benefits of AWS, namely agility, elasticity, and cost savings.

"With AWS customers can quickly spin up resources as they need them and deploy hundreds or even thousands of servers in minutes. This means they can very quickly develop and roll out new applications, and it means teams can experiment and innovate more quickly and frequently. Customers can also now provision the exact amount of resources that they actually need, knowing they can instantly scale up or down along with the needs of their business. AWS allows customers to trade capital expense for variable expense, paying for IT as they consume it. And, the variable expense is much lower than what customers can do for themselves because of AWS' economies of scale. Netflix is an example of a media organization that utilizes AWS to deploy global systems serving millions of customers in a timescale that has never been seen in linear broadcasting," Duffy adds.

Deluxe's Morgan Fiumi sees agility as being a "consequence of embracing change and responding appropriately, using technology to drive both efficiency and innovation. We are creating solutions that enable a faster time to market with improved customer experience. Once integrated into a client's workflow, Deluxe One allows clients to rapidly respond to changing needs in programming and provides them with instant access to their content. Clients can consume services on demand and fill gaps in their supply chain without having to implement and be beholden to large monolithic systems. They can be more agile and pick and choose the tools they need based on whatever the specific scenario dictates."

Agility is vital not only in terms of flexible resource provisioning, but also in being able to instantly respond to "market changes, consumer demand, or even simply breaking news that might affect programming," says Crystal's Roger Franklin. "Being able to easily replace ads or content is an important part of that agility. The video industry is changing quickly and having the right tools and systems in place which are flexible, like Crystal Connect, are key to ensuring you will be ready for the next change. The other important aspect is that the current systems simply cannot be turned off or

forgotten about which is why Crystal builds solutions that work with existing broadcast systems and workflows. Being able to adapt at the drop of a hat will be a real bonus for providers."

AI to enhance agility

AI will play an increasing role in improving supply chain agility according to VSN's Patricia Corral. "More 'smart' automation is needed, in order to help users concentrate on creativity and content creation, rather than on manual and repetitive tasks. In the end, greater automation of tasks lets users become more agile when creating content and thus, companies can be more competitive in the market and stand out.



"In this regard, one of the technological advances in which we are investing more resources in is Artificial Intelligence. We already consider AI a fundamental piece in the development of media management and in fact, we have integrated our MAM system with different AI services like IBM Watson, Google Cloud, Microsoft Azure and Etqmedia, to help users automatically extract and detect metadata, both for quick cataloguing and advanced search purposes," Corral continues. "For example, with our VSNExplorer, MAM users can now perform searches of very specific content, such as all the red cards shown during a football match or the most recent public appearances of a famous person, in a matter of seconds. However, our goal does not stop here. We are determined to make AI gain a greater relevance in our platform little by little, being able, for instance, to self-segment content or chapters of a program, automatically create video edits for promos and advertising, or to recommend to the user when should cuts for advertising be included in the programming."

Arvato Systems' Ben Davenport sees agility reaching back into technology suppliers' own working methods too. "We can work with our customers in an agile way. Agile project management is common in other IT disciplines but still in its infancy in the M&E industry. By applying agile methodology to projects our customers are able to ensure that the end result truly meets their needs, without having a crystal ball at the start of the project or even before an RFP. This also changes the relationship between vendor and end-user to a far more collaborative one. Agility should increase efficiency by virtue of reduced waste."

KnoxMediaHub agrees. "By using the cloud and agile methodologies, companies can easily experiment and

test new products and services without significant cost,” says Daimon Hall. “Their media assets, being in the cloud, are ready to be customized and/or transformed without effort. Media companies are empowered to compete in an environment that is no longer a value-chain, but rather a rapidly changing ecosystem.”

Future-proofing

That ever-changing ecosystem also puts pressure on technology vendors to build-in the ability to respond to as-yet undefined future requirements. “KMH provides a new level of agility in that we supply a platform that suits today’s requirements. Over time, the need to adapt to new workflows is highly likely; clients will not want to continually be on the lookout for their next solution. The ability of an existing supplier is now to mold new requirements and workflows into an existing solution; this has become paramount,” Hall adds.

Grass Valley’s Maycock sees the increasing adoption of IT and software-based systems as the way forward. “As broadcasters and media companies have to adapt to the rapidly shifting media landscape, using the right technologies is critical to creating agile infrastructures and workflows. The move to adopt IT and software-based systems, which are more flexible, makes it easier to facilitate increased agility. Unlike with proprietary systems, in a software-based environment, broadcasters can very quickly change the job that the infrastructure is doing; processing is now generic computing, allowing facilities to run different pieces of software to do different jobs. This enables customers to adapt to different requirements very quickly by reconfiguring the system and re-allocating resources to different parts of the chain as needed.

“BBC Three in the UK is an excellent example of a channel that launched as a linear service and then went digital to respond to the changing demands of its viewers,” Maycock adds. “In the current market, deploying a fixed, linear system and expecting to capitalize on it in five years is no longer viable, whereas software-based systems running on standard IT can very quickly adapt to market trends as they evolve.”

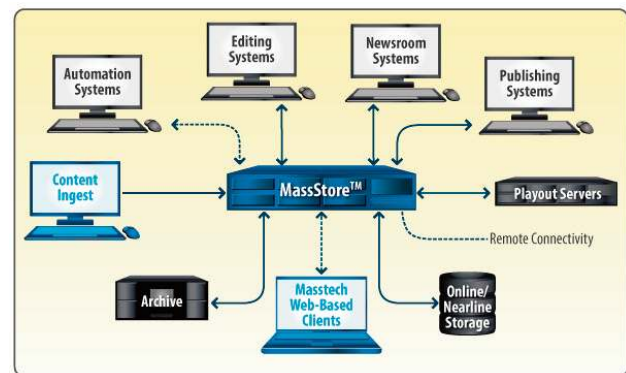
Keeping up standards

For Vidispine, agility means that “customers can pick and choose between best-of-breed services, as needed for the current business requirements, without having to sign up for long-term contracts, or wait for a new service to be integrated,” says Patrik Malmberg. “With API-only and standards implementations wherever possible, all integration work with new services can be

done without much hassle, e.g., to add on a workflow engine or a DRM solution. Vidispine API including services runs on any cloud, and for customers that are not ready to go full cloud, Vidispine can offer hybrid solutions to bridge the gap between on-premise and cloud.”

Standards matter to Masstech Innovations too.

CTO Mike Palmer says, “Standards do matter and are needed for long-term stability and solid infrastructure – this is why Masstech supports and contributes to SMPTE standards. The market is moving too fast and in some cases requires less formal and rigorous standards than SMPTE, such as customer and vendor-focused working groups, such as the MOS Protocol group, to which we also contribute. We see the combination of formal/rigorous and rapid-response/dynamically-flexibly processes complement each other rather than competing.”



The road ahead

We asked all our respondents what’s next in the content supply chain. Cinegy’s Lewis Kirkaldie predicts “A continued drive towards subscription models; cloud-based virtual appliances and workflows; and all-IP production and distribution.”

Deluxe’s Morgan Fiumi points to “Personalization of content driven by massive amounts of consumer data and advancing AI capability. For broadcasters, two key drivers will be the transition to IP based delivery and the integration of disparate workflows platforms into a single unified solution. IP’s ability to facilitate two-way data exchange, will allow broadcasters to track their users’ viewership data and providing customized viewing libraries and EPGs, as well as serving consumers with far more personalized, (and valuable) advertisements. Whilst the unification of back-end workflows for live,

linear, and OTT will greatly accelerate the ability to develop AI which comprehends the entire broadcast universe, rather than compartmentalized sections.

"Imagine a future where you are watching a soccer game, and are impressed by a particular player. AI software could identify that player purely from their image, and then automatically scan through a broadcaster's content library, and create a bespoke highlights playlist combined from live game footage and pre-recorded features, all just for you. That future is not far away..." Fiumi concludes.

Cloud, cloud, cloud

AWS' Niall Duffy naturally sees the cloud as enabling the next steps forward. "The next step will be cloud-based playout for linear TV as well as OTT, and companies that range from Discovery Communications to FashionTV have proven that cloud-based playout is both feasible and economical. Once playout begins to move to cloud it unlocks the entire content supply chain – when you originate in the cloud for playout then it makes sense to have content in the cloud from the earliest moment, as more end to end, cloud-based workflows will be faster, more adaptable and cost-effective than on-premise workflows. Tools like AI will further enhance the benefits of the cloud through automation and in providing greater insight into customer needs and operational processes."

"The cloud. We believe that media companies who do not go cloud in the next few years will cease to be competitive and sustainable and will disappear."

Signiant also sees a cloud future. "There are now active cloud deployments at most media companies from using SaaS solutions like Media Shuttle to incorporating cloud services from AWS and Azure," says Greg Hoskin. "Many companies are still in the beginning phase of developing a full cloud strategy, but there's a lot of focus on it as companies have seen how well it fits their business needs. The cloud's elasticity and flexibility align perfectly the media industry's project-based nature, spiky compute demands and complex storage requirements.

"We are still in the early phases of witnessing how the cloud ecosystem will transform the media technology industry. For example, cloud-native SaaS enables rapid innovation and huge economies of scale. I think we will

see a slowdown of companies deploying expensive custom software solutions and instead look to simplicity, deploying SaaS solutions at a fraction of the cost and allowing them to be much more agile than if they were wedded to an expensive custom behemoth," Hoskin concludes.

For KnoxMediaHub, the future is a one stop destination. "The cloud. We believe that media companies who do not go cloud in the next few years will cease to be competitive and sustainable and will disappear. The KnoxMediaHub Platform is a smart and smooth way to embrace the cloud by any media organization. By integrating with legacy systems and workflows that are still functional, it can progressively be upscaled as in-house systems reach saturation or their end of life," Daimon Hall concludes.

Controlling costs, increasing revenues

Arvato Systems looks across the three areas of the content chain in which it operates. "In Produce, technical innovation and the adoption of cloud now enables flexibility in where and how we work, even when working with full resolution video, which is going to have significant impact on the way we work. In Manage, solutions for scaling storage and processing, e.g. transcode, dynamically using private or public cloud resource are now robust and reaching maturity. To fully exploit these solutions and maintain efficiency, the workflow management and automation that consumes these resources needs to be cost aware. Later, with integration to rights management and audience metrics, we may even see RoI calculated on a per-asset basis. Finally, in Monetize, automation, integration and personalization. Automation in a sense that the majority of repeatable processes, workflows and decision will be supported, if not even replaced, by AI. Integration will allow to use particular services from everywhere rather than using complex and siloed applications. Greater personalization of content, but also advertising, will be a key trend over the next years both for online video, but also through 'traditional' linear television with optimization of placement and 'edge' ad insertion," Ben Davenport concludes.

Crystal sees the battle for advertising revenues continuing to escalate. "We have already seen that consumers are favoring media stacking, getting content from several different sources," says Roger Franklin. "This is likely to continue and with that we will see more and more niche services launching to tap into the demand for a wide choice of content. At the same time,

consumers will continue to expect all that content for free or very little investment and providers will be pressurized into keeping costs low, even for premium content. However, the modern consumer doesn't mind sitting through ads to access that content, especially if those ads are relevant. Advertising revenue will therefore become all the more crucial, and the broadcasters and service providers will be looking for new ways to keep advertisers happy and serve consumers with relevant and engaging ads."

More consolidation coming our way?

"We anticipate large-scale mergers and acquisitions in the industry – and an acceleration in the rate at which they take place in the near future. The broadcast and media space is currently heavily saturated with a lot of technology providers all hungry for market share, and consolidation is a sound strategic driver to combat this. Belden has clearly demonstrated strong intent to be part of that process. With the backing of the Belden Brand, Grass Valley has both the stability and the resources we need to continue innovating so we can meet the competition head on," Grass Valley's Neil Maycock concludes.

Prepare for the unknown

For VSN, the future means being prepared for the unexpected and acting quickly. "We will keep witnessing how new innovative technological advances will continue entering and disrupting our sector, as has recently occurred with the AI," says Patricia Corral. "And the most exciting, but also the challenging, side of this is that we will be capable of applying all these new – and today inconceivable – technologies to content creation and management in just a matter of months.

"Thus, we do believe that it will be key for broadcasters to strengthen their existing systems and ultimately, invest in new technology for media and business process management that allows them to integrate all these new and disruptive technologies easily without losing any of their systems' potential and usefulness and of course, without affecting users' productivity and daily work," Corral concludes.

The prize for the most succinct – and, judging by the enormous changes our industry has gone through recently that few can have fully predicted, most prescient – goes to Masstech's Mike Palmer: "Unpredictable change. Semper Paratus." For those of us who aren't Latin scholars, that means 'Always prepared'; great advice in any language!



Unpredictable
change. Semper
Paratus.

Mike Palmer, Masstech

New IABM member deal – for NAB Show

Many of you exhibit at the NAB Show in Las Vegas. We hear from you all the time that it's a key event in the calendar but it's becoming more and more difficult to participate due to the high cost of exhibiting and difficulty in navigating the rules and regulations.

The good news is the NAB Show has been listening and is making significant changes to address these concerns, so it stays a viable marketplace.

Here's a run-down of what NAB Show is doing. They are first addressing material handling, which is the cost to transport items from a carrier's delivery vehicle to the booth space and back again. Differently from Europe, material handling in the U.S. is an exclusive service performed by the general service contractor. Through research, NAB found that exhibitors were paying on average more than \$6.35 per square foot for material handling /drayage and that this expense represented approximately 13% of an exhibitor's total spend on services at the NAB Show. Both international and domestic exhibitors have found this expense to be costly, confusing and unpredictable.

As you may be aware, NAB has introduced Unlimited Material Handling for the 2019 show. A **new fixed rate of \$3.85 per square foot** covers all items an exhibitor brings to the show – regardless of quantity, weight or

volume. This is **nearly a 40% reduction on last year's rates** – which we are sure you will welcome. The new rate fixed rate also, of course, makes budgeting predictable.

NAB Show is also working to address other exhibitor challenges beyond material handling such as rigging, electrical, food service and internet costs; you can expect announcements later this month about changes to rigging and electric pricing models. NAB Show is also working with official vendors to improve operational procedures and rules to make it easier and more cost effective for exhibitors to participate.

To keep up to date with these and other important changes with the NAB Show, please follow the NAB Show exhibitor blog. We will continue to bring your concerns to the attention of the NAB and to work with them on bringing about positive change for all of you.

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According to our data, the average percentage of marketing budget allocated to tradeshow has declined by about six percentage points to 38%

Supply Trends: The State of Media Technology

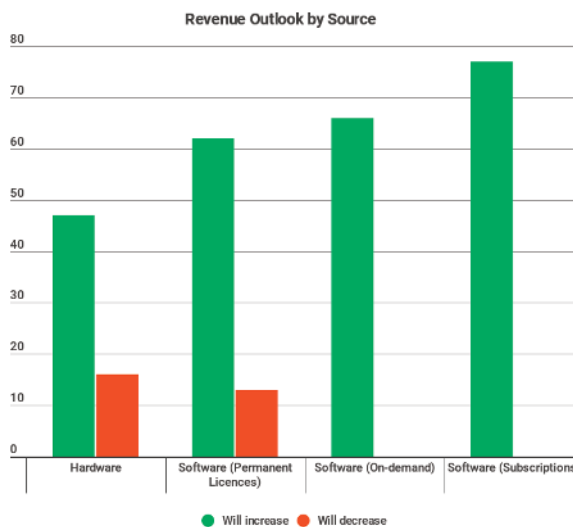


Lorenzo Zanni
Head of Insight & Analysis,
IABM

The preliminary results of our latest Supply Trends Survey show an industry that remains in flux. As media companies continue to migrate to direct-to-consumer models, technology demand is shifting towards Opex-based solutions that hinge on the flexible provision of software.

Although hardware remains the principal revenue source in the industry, its overall contribution is declining as more technology suppliers move to software. What's more striking, however, is the outlook with regards to software payment models: permanent licences are down compared to subscriptions and consumption-based revenue models, which are on the rise. These interesting findings are illustrated in our infographic below.

Revenue Models Are Changing

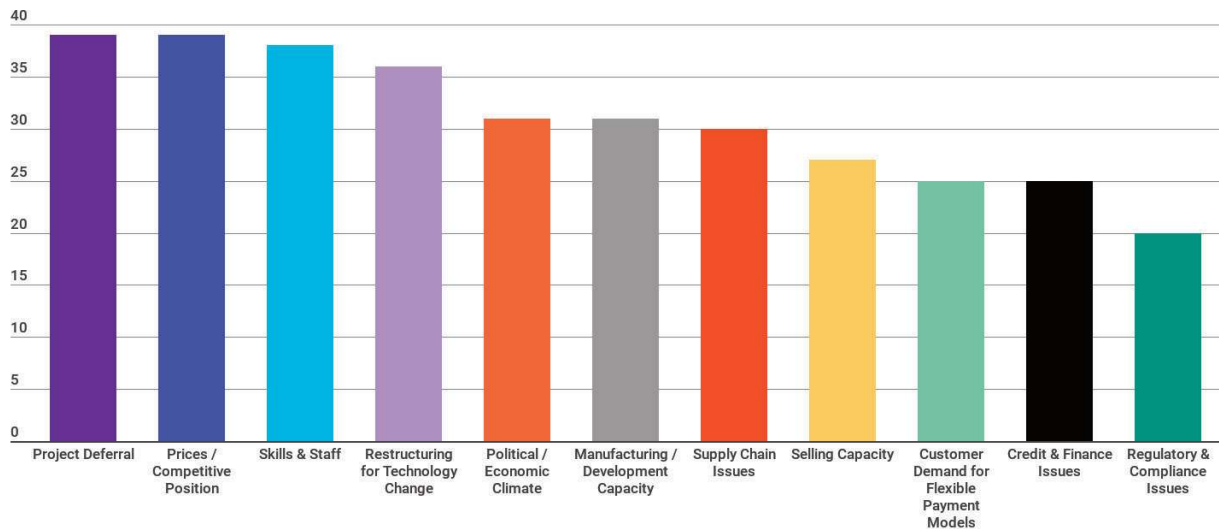


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Most of this investment remains focused on two important industry transitions: cloud/virtualization and IP

Industry Challenges

Ranking of most important factors limiting growth



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The transition to flexible software models has far-reaching implications for media technology suppliers, ranging from revenue growth to marketing strategies. For example, media technology suppliers are spending less money on tradeshows as they move to the (online) recurring revenue models mentioned above. According to our data, the average percentage of marketing budget allocated to tradeshows has declined by about six percentage points to 38% while 79% of companies told us that their budget for these events is stable or declining. With regards to revenue growth, the transition to recurring revenue models presents the challenge of coping with the initial financial shortfall that comes with it. Most suppliers in the industry are going through this difficult revenue transition and restructuring their businesses to make it possible. Strategic acquisitions, business reorganizations and workforce reductions are all signs of this change.

Although profits should benefit from the transition to software, the current reality shows that these are being bitten by technology commoditization

and R&D investment – the latter is still high compared to similar industries. According to our data, most of this investment remains focused on two important industry transitions: cloud/virtualization and IP.

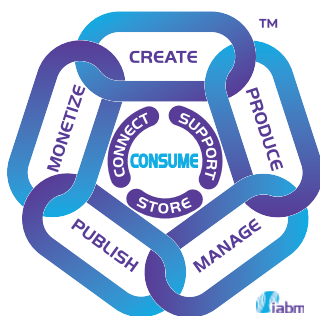
Cloud/virtualization is the focus for software suppliers while IP remains more relevant to hardware vendors. These transitions are requiring suppliers to update the skillsets of their engineers with a blend of broadcast and IT skills.

The need for change is urgent as media companies increasingly adopt an OTT-first approach – most suppliers have told us that their customers are focusing their technology budgets on internet distribution of content. If change does not happen, media companies won't buy media technology from suppliers and will build their own – IABM members can check out our Buying Trends Reports for an update on this.

Our ranking of the top factors limiting growth shows how these trends are challenging the supply-side of the industry.

As mentioned above, most suppliers in the industry are going through this transition. In our latest survey, we have changed as well by restructuring some of the sections around our new BaM™ Content Chain model. This model moves away from an inward-focused, product-centric view of the broadcast and media business, to one based on the creative, operational, economic and technical activities supporting the content supply chain: mapping how a piece of content gets from camera to consumer.

The BaM™ Content Chain is represented visually by the five main links of the Chain, with the consumer at the center, and the crucial functions around the middle that join everything together and enable it to function.



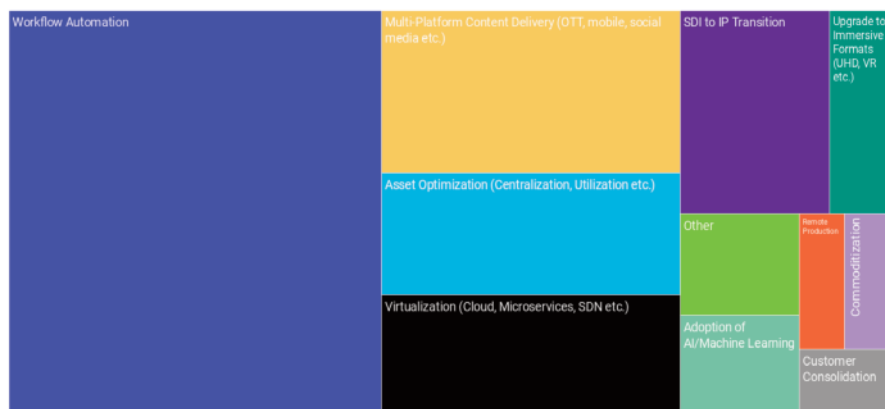
THE BaM™ CONTENT CHAIN

from **Creator** to **Consumer**

In our latest survey, we provide an analysis of the most important demand drivers in each supply chain block – from content creation to consumption – in order to give our members actionable information on what is shaping demand in specific supply chain blocks. Below, we have included a chart showing the most important demand drivers in the Manage block, which includes technologies used to manage/prepare content and orchestrate workflows.

What is Driving Demand?

Most important demand drivers in Manage



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Our analysis shows that in Manage, more investment is going into augmenting current content management systems with new functionalities to automate routine workflows, make assets more easily accessible and share content on multiple platforms. Interested readers will find more information on the other supply chain blocks in our Supply Trends Report and IBC2018 Strategic Industry Analysis.

The rate of change in media technology is accelerating as media companies go direct to consumer. Media technology suppliers are disrupting themselves as they strive to keep abreast of the fast-changing media landscape. We are certain that the changes IABM has made to its business intelligence offerings will play an important role in providing members with even more relevant, up-to-date and actionable business information.



IABM GLOSSARY OF TERMS

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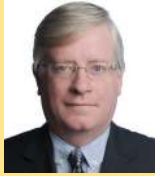
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APAC region update



Peter Bruce
Director, APAC
IABM

UHD in Asia moves forwards

I reported in previous journals the moves of South Korea, Japan and China towards UHD over the last 18 months or so.

UHD continues to progress in South Korea with TV channels KBS, MBC and SBS already transmitting the higher resolution TV (and benefiting from the push at the Winter Games this year). Importantly this has been over the air with ATSC 3.0. Now there has been another development, with LG Electronics and the Allied Platform together launching the TIVIVA interactive system, a terrestrial 4K/UHD interactive service.

The TIVIVA platform was demonstrated to IABM at this year's KOBA show by LG. The emphasis is that although the UHD picture is received directly to the screen via the terrestrial signal, the interaction on the TIVIVA system inside the LG Screen allows replay of programs and interactive learning of the kind of content that the viewer prefers. The high quality ATSC 3.0 transmission is being supplied by IABM member company Rohde & Schwarz and coverage across the whole of South Korea is gradually being rolled out.

We should highlight that although the TIVIVA is only available on LG screens, it is clear that the move to high resolution alone is not enough;

the interactive side of the system is just as important and critical to the experience of the viewer as the higher resolution.

Meanwhile in China, the number of UHD OB vehicles that are appearing in the outside section of BIRTV and CCBN exhibitions in Beijing just grows and grows. Chinese UHD production is set to take off as the government is leading the push for UHD. This government support, coupled with the growth of numbers of production UHD TVs (and 4K mobile devices) for the China market and rapidly dwindling prices, is starting to encourage demand for UHD content by viewers.

The launch of SMG's (Shanghai Media Group) new UHD truck on the first day of the NAB Shanghai show was impressive and it highlighted future investment that is still to come by the Chinese TV stations in the coming years. This happened to be a full Grass Valley UHD / IP truck. Although the overall China broadcast market seems to have slowed a little over the last two years, it is clear that investment will be needed by the channels soon and this should boost the supply side, particularly for production and post production, within in China.

There is still an ongoing debate of IP vs 12G SDI in China. IP does not



seem to have won the day completely as there are still systems being specified in SDI. There is a premium for an IP system in terms of the cost of implementation. A lot of this may be due to the re-training and skilling needed; the comfort of knowing that the engineers have worked in SDI for over 20 years now helps the decision to go with what you already know. However, as the full IP chain gets completed with standards such as Auto Detect, and we understand the benefits of the bidirectional nature of IP, the agnostic behavior of working with data over IP and get to grips with timing the signals, the pendulum will swing fully in the direction of IP.

Meanwhile in June at the CES (Consumer Electronics Show) Asia in Shanghai, Sharp/ Foxconn were highlighting to consumers the difference of live 2K HD Vs 8K,

The ConneCTechAsia Summit brought together a total of 500+ delegates and 100+ speakers

BroadcastAsia 2018

clearly believing that there is a long-term opportunity for even higher resolutions.

Across Asia, the international OTT channels are allowing viewers to download and view UHD content mostly online. This is making even parts of South East Asia wake up and at least start production in UHD. VTC of Vietnam has started a trial 4K/UHD channel and UHD OB trucks have been delivered to Myanmar. As many countries in South East Asia are still trying to complete the digital transition, any distribution and viewing of UHD programing will initially be either over IP or Satellite. However, Globe Telecom of the Philippines formally announced "its fifth-generation (5G) wireless technology adoption, with its first 5G network service slated for commercial rollout by the second quarter of 2019". Both Globe and rival PLDT are looking at 5G implementation to rapidly deploy high speed internet to areas where cable / fiber roll out has taken time. This will then allow the viewing of UHD channels in many homes and mobile devices across the Philippines.

It is clear that in the coming years the roll out of UHD will open up opportunities for suppliers. This will initially be for the production side as the limited amount of content is creating a heavy demand, and that demand will grow as the distribution of the higher bandwidth signals becomes resolved.

BroadcastAsia 2018 took place at Suntec City, Singapore between 26th and 28th of June. This was the show's 23rd year, and it runs in parallel with CommunicAsia at Marina Bay Sands Expo Centre. Both shows come under the banner of ConneCTechAsia, and also running concurrently was NxtAsia and zones with ProAudioTech, TV Everywhere! and eSports.



The theme of the Conference at BroadcastAsia was 'Capture the Future' – designed to reflect the rapidly changing broadcast and media environment.

The Conference

The Conference was rolled out under the ConneCTechAsia Summit, the theme for which was 'Experience the future'. This was very apt as it had many experienced speakers in new media and disciplines which broadcasters are now starting to realize are on the horizon. The hot themes included the following: Adoption of IP; UHD and HDR delivery to consumer; Big Data Analytics; Artificial Intelligence (AI); Machine Learning for broadcasters; Augmented and Virtual Reality; OTT; Video optimization with SDN/NFV network Broadcast; IoT and 5G. All in all, a variety of topics which are very relevant to today's media industry.

The ConneCTechAsia Summit brought together a total of 500+ delegates and 100+ speakers. One track focused on the commercial aspects while the second track was more technically focused.



This year there were open presentations on the 6th floor of the exhibition hall, in which IABM ran the Technology Theatre on the first day with 12 presenters. The sessions kicked off with IABM's CTO Stan Moote and 'Tomorrow's Toolbox – Today', with some great sessions from IABM member companies such as 'Live centralized IP Sports production across Australia' from Marc Segar,

The hot themes included the following: Adoption of IP; UHD and HDR delivery to consumer; Big Data Analytics; Artificial Intelligence (AI); Machine Learning for broadcasters; Augmented and Virtual Reality; OTT; Video optimization with SDN/NFV network Broadcast; IoT and 5G

Director of Technology NEP Australia, and 'Real-World Impact of Machine Learning in Broadcast' from Baskar Subramanian, Co-founder, Amagi Media Labs.

The Exhibition

The exhibition at BroadcastAsia 2018 was split between the 4th and 6th floor with Content Management & Systems, Content Distribution & Delivery and OTT (TV Everywhere Zone) being on the 4th floor. The Professional Lighting, Acquisition / Cinematography, Film & Production / Post Production exhibits and presentations were on the 6th floor.

Because of response from the exhibitors and attendees, in 2017 BroadcastAsia moved to Suntec Singapore. It is also a 3-day event, so there was certainly pressure to fit in all meetings and demonstrations within the allocated time – especially if you had meetings in Marina Bay Sands as well as Suntec City.

IABM activities

IABM continued to run a networking event at the Pump Room micro-brewery in Clarke Quay on the Monday before the opening. This event has been held in this venue for many years now and has become a continuously growing tradition. This year was a little special with end-users present, who were invited by the sponsors Benchmark Systems, Atomos, Dolby and Telstra.

On the Wednesday and Thursday morning IABM ran an 'Industry Update' with an Asia-Pacific Regional Focus and Technology presentation called 'AI – is it for real or just marketing hoopla for smart data crunching?' Both events were well attended, and featured great panelists including: Amber R. DeQuiroz – Marketing Manager of IBM; Bea Alonso – Director of Global Product Marketing – Ooyala; Shigeyuki Fukushima, Technical Lead for Asia Microsoft Corporation; Nigel Smart, Chief Operating Officer of Adelaide Football Club; Anna Lockwood, Head of Media Market Development – Telstra; and Johan D. Kremer, VP Strategic Accounts and International Business Development – AIQ.

IABM member companies were supported by the IABM staff and there was also a Members' lounge in which they could have meetings and relax away from the exhibition floor. Additionally, IABM TV was present recording many interviews from the show floor and exhibitors' booths. The videos can be viewed at www.theiabm.org/on-demand/iabm-tv

On the Thursday, we took the opportunity to hold an IABM APAC Members' Council meeting, which elected Dennis Breckenridge (ABS – Managing Director) as Chair for the new 12-person Council for the coming two years.

On the Friday, IABM held an Exhibition Task Group (ETG) meeting with the members, gaining feedback and relaying this, together with, ideas and concerns to the BroadcastAsia organisers. This is all part of the IABM's strategic relationship with the organisers.

Conclusion

There did seem to be a slight decline in visitor numbers from previous years. Most member companies did express that the quality of attendees was strong and they would exhibit again in 2019. BroadcastAsia has always been a well-run event and with the organizers' focus on ConnecTechAsia, it is clear that they will embrace the future.



Broadmedia & Entertainment

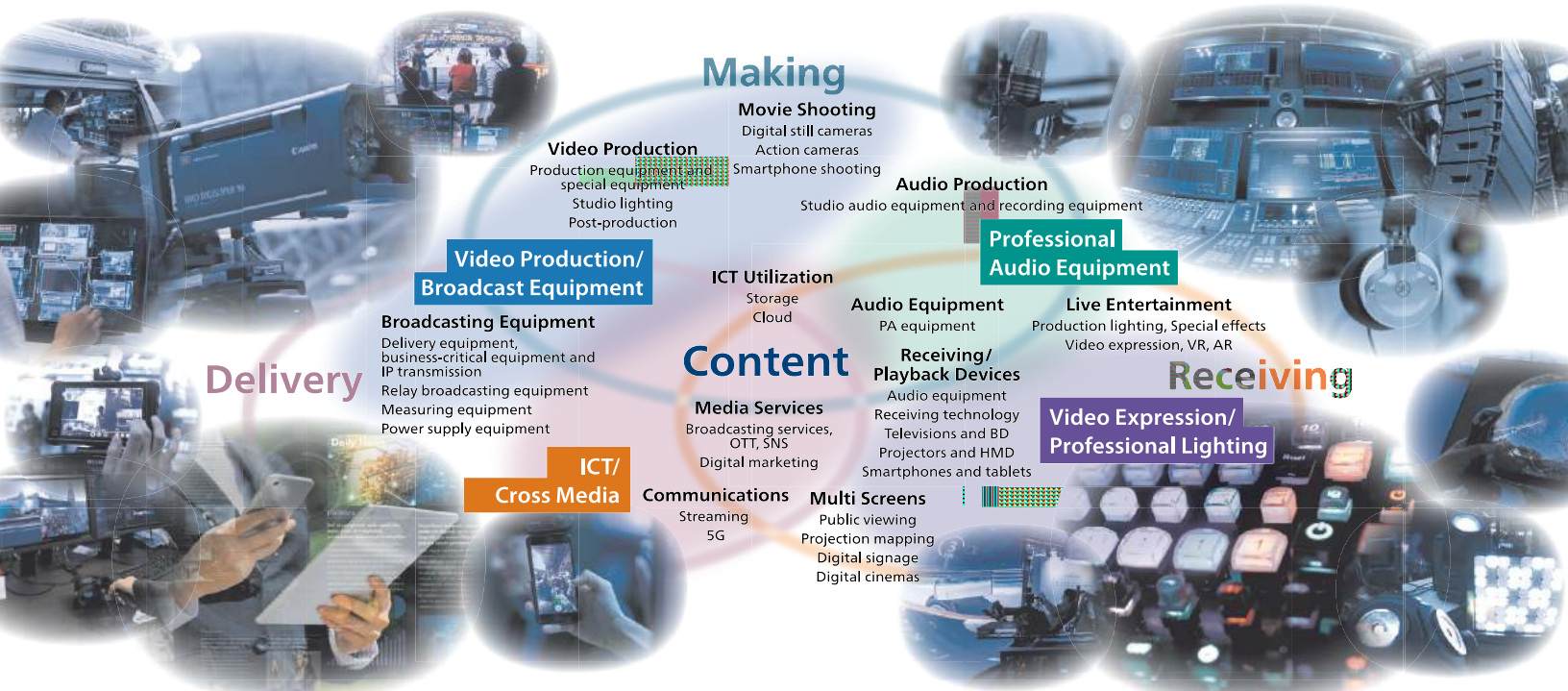
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MEA region update



Hassan Ghouli
Director of MEA,
IABM

The current business environment in the Middle East & Africa region continues to be challenging, but there are several good reasons to maintain a positive outlook.

The MEA region has been through a few months of slow activity. This started with the month of Ramadan in May/June – then came the hot summer holiday season which is typically marked by a large exodus of local residents to cooler climes. This is about to come to an end with the conclusion of the pilgrimage period and the Eid Al Adha holidays at the end of August, and the return from the summer school break in early September.

During my many meetings with IABM members and broadcast organizations over the holiday period, I could sense that the majority of our members are feeling the pressure of a noticeable drop in the number of media projects available in the region. This is

further exacerbated by the increasing delays in obtaining payments for completed projects.

It is no surprise that one of the main reasons behind this cash crisis is the shrinking revenues from traditional advertising. As media consumption is steadily shifting from conventional linear TV to the Internet, digital advertising is gradually attracting more advertising money. Another reason for the lack of cash is the volatility of the price of oil which has forced government organizations, including a large number of government owned broadcasters and media companies, to take measures to reduce costs and control their expenditures.

Oil prices have steadily improved over the past year. The current price of a barrel of Brent Crude is hovering around the \$75 mark, while a year ago it was around \$55 per barrel (see below Bloomberg chart). The current price level is more comfortable for the region's oil producers, and, with the increased output recently announced by OPEC, this means more oil revenues for the region.

The increase in oil revenues means easier availability of cash. This will eventually lead to a slow return to pre-crisis media spending levels. However, this return will not happen overnight as the region is still witnessing several geopolitical conflicts which are hampering the return to normal spending patterns as they affect the allocation of cash to various national and regional priorities.

The MEA market is seeing several initiatives which are expected to energize the media and entertainment sector. Chief among these initiatives is the opening up of the entertainment market in Saudi Arabia. A recent article in Forbes Middle East magazine underscored the importance of this move to the media industry by highlighting that "the Saudi government is now throwing significant support behind the local media industry, emphasizing entertainment in particular as a quality of life issue and a means to build a private sector that is less reliant on oil revenue".

It is estimated that Saudi Arabia will invest about \$60 billion in the next ten years in several entertainment ventures, as part of its Vision 2030 program. The Kingdom has always



acted as the prime mover of business in the whole MENA region and particularly in the GCC countries. The move will help revive the regional media industry as more local and regional content will be required for the many delivery platforms that are becoming available for viewers in the region.

Other regional initiatives include the Dubai EXPO 2020 project which will call for large investments in various sectors of the market including the media and entertainment sector. The 2022 World Cup which will be held in Qatar is another major event that is creating opportunities for the media market segment.

Finally, another reason to be optimistic about the future regional outlook is the fact that regional governments have taken several steps to diversify their economies and are now better prepared to navigate the waters during difficult times.

The Forbes Middle East article concludes that “the prospects for the entertainment and media sector in the region are positive, despite the challenges faced by traditional media. Strong government support over the next several years will dramatically increase the number of entertainment options, even as growing consumer demand for content – including new channels for accessing it – will encourage growth and attract private-sector investors”.

Make the most of IABM membership



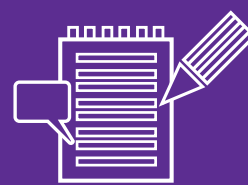
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IABM launches regional Industry Advisory Boards



Darren Whitehead
*Director of Business
Development, IABM*

For the last three years or more IABM has been delivering benefits to members on a local level through our regional Members' Councils initiative. Each IABM region (UK, Europe, Middle East & Africa, the Americas and APAC) has a regional Director and an elected regional Members' Council.

This initiative has multiplied the opportunities for members to network, learn, speak and grow their businesses. An agenda led by the members themselves via the regional Members' Councils, together with resource and funding supplied by IABM, has seen a growth in local language newsletters and events covering themes such as IP, virtualized playout, cyber

security, and post-production. Throw in customer participation and interaction, studio/facility tours (and drinks!) and you can imagine how popular these have become. So much so in fact that IABM had broadcasters asking for more...Chris Exelby, Chair of UK Members' Council (and Managing Director of TSL Products), explains, "I have always believed IABM needed to bring



more engagement with actual customers into its remit and scope. Launching local events in the UK and inviting our customer base to attend for free has proven that in this time of dynamic change within the broadcast & media industry, customers have as much to gain from better relationships, understanding and collaboration, as suppliers. I welcome the instigation of the UK Industry Advisory Board as an extremely positive first step to greater exposure and collaboration with customers.”

“Following a number of customer-attended events in the UK we had many customers asking for a more formal way to interact with IABM and its members. The perceived value of interacting with IABM members via a non-commercial engagement platform was extremely high. Simply put, seeking a partner rather than a supplier whilst navigating/adopting new technologies and business models, meant opportunities for sharing and collaboration via a trusted source were (and are) highly prized. Being a highly responsive organization, IABM immediately launched the regional Industry Advisory Boards,” Exelby concludes.

The regional Industry Advisory Boards are designed to provide a platform based on mutual respect and understanding for continuous dialogue and collaboration between IABM members (suppliers) and their global customers; in short, to bring the buyer and seller communities closer together for the benefit of all by encouraging partnerships between buyers of broadcast and media technology, IABM and its 500+ supplier member companies around the world. Members of our Industry Advisory Boards will help us shape the future success of our industry.

The UK is the first region to launch an Industry Advisory Board, with members drawn from senior broadcast and media company executives. Participating on the UK Industry Advisory Board to date are –

Sinead Greenaway <i>Chief Technology & Operations Officer</i>	UKTV
Ian Cottrell <i>Director of Broadcast Distribution & Services</i>	ITV
Ian Wagdin <i>Senior Technology Transfer Manager</i>	BBC R&D
Jamie Hindhaugh <i>Chief Operating Officer</i>	BT Sport
Paul Clennell <i>CTO</i>	Dock 10
Rob Cranfield <i>Director, Media Supply Chain EMEA</i>	Turner Broadcasting
Ross Kemp <i>Head of Connectivity Architecture</i>	BBC Engineering

Ian Cottrell of ITV says, “With so much constant and rapid change in the way media is both being consumed and delivered, it is important to be ahead of, and to be able to influence, what is happening in the industry. Not least is the shift we are currently seeing from traditional broadcast technology to IP – and realising the benefits and possibilities this could bring with fellow professionals. I am very much looking forward to participating on IABM’s UK Industry Advisory Board.”

“In our industry, the media technology sector continues to evolve at a phenomenal rate – from technical developments and standards through to new business models and service offerings. Working with the IABM, I’m looking forward to exploring the challenges and opportunities these developments bring, fostering even more industry collaboration and innovation as we try to establish the best approaches that will deliver the greatest benefits for our industry,” Cottrell concludes.

Creative collaboration: how working with DELTACAST enables customers to focus on their core business



Olivier Antoine
*Head of Software Product
Development,
DELTACAST*

“As a broadcast equipment designer and manufacturer, why should I rely on an external partner to implement my video interfacing?”

This question arose at many solution providers before they became DELTACAST partners and started using our video interface solutions. These companies chose to entrust DELTACAST with the responsibility of implementing the video inputs and outputs of their products and appliances. Let's have a look at why and how it works for them.

With DELTACAST customers being professional – often large and renowned – broadcast equipment manufacturers, they generally have all the necessary knowledge and resources to design their video interfaces in-house, so the reason for relying on DELTACAST is rarely a question of lack of technical capability. So why have they chosen DELTACAST solutions instead? The reasons are several, but all come back to concentrating on what they are good at and relying on a collaborative, expert partner to deliver a key element of the solution quickly and efficiently.

‘Time-to-market’ is the first, most obvious reason, and common to all. Designing and prototyping, then integrating and producing, your own custom electronic devices takes a lot of time, while your need is generally linked to a much shorter timescale. In this case, picking an off-the-shelf product not only avoids you having to go through the whole design and manufacturing process and associated delays, it also protects you from the risk of further shifting your roadmap due to a design error or to a manufacturing issue. By working with DELTACAST interface cards, equipment manufacturers secure this part of their design as working, qualified and compliant components that are available right when they need them.

The second reason is more subtle: broadcast equipment manufacturers, even if they were founded years ago as electronics design companies, are progressively but decisively turning into software engineering companies. Actually, designing a software-based broadcast product generally carries a lower overhead – and hence is more profitable – than implementing the equivalent functionality through custom hardware. Software also means much more flexibility and is much easier to further develop and add new capabilities to than hardware.

On the other hand, broadcast video signal handling still requires specialized hardware, as a computer cannot natively ingest and playout SDI video unless it is equipped with interface cards such as those offered by DELTACAST. This transition to software design whilst dealing with very specific video signal types, results in the need to use an interface card, and users cherish DELTACAST products for their abstraction of those video technologies: if you prefer not having to deal with all the fine details of SDI, ASI or HDMI interfaces, the software interface provided by DELTACAST lets you simply work with video frames – and audio samples – and does all the internal cooking for you. However, if you wish to control every aspect of the video signal, DELTACAST products also provide you with advanced software interfaces which open doors on all the details of ancillary data, video clock and timings, and various other low-level parameters.

Dealing with SDI interfacing, another aspect we often hear is that broadcast equipment manufacturers are having more and more difficulty



coping with the evolution of broadcast standards. Going from analog to digital, from SD to HD then to UHD or even 8K, from SDR to HDR, is already challenging when designing a video transcoder, a captions inserter or a video processor. Imagine if, in addition to that, you had to manage all the electrical details of such transitions, while dealing in parallel with the evolutions of computer technologies and particularly of processors, memory, and PCI bus. All these factors would keep you far away from focusing on your core business if you could not rely on a partner dealing with them for you. Fortunately, DELTACAST software interfaces are conceived to allow you to work in a similar way whatever underlying hardware or technology is used, and this is something people really appreciate as it makes technological transitions much more straightforward.

A recent example of this advantage can be seen with how UHD and 4K became established in the industry: the very first 4K deployments used four SDI cables, each one carrying one quarter – or quadrant – of the final picture. In some installations, mezzanine compression technologies using visually lossless codecs such as TICO allowed 4K pictures to be carried on a single SDI cable. Then SMPTE standardized the transport of UHD video over a multi-link SDI interface using a completely different method – known as ‘2SI’ – consisting of distributing and interleaving video samples over these multiple transport links. More recently, 12G-SDI technology, and associated SMPTE standards, now offers sufficient bandwidth to allow the transport of UHD video on a single cable without the need for mezzanine compression. How costly would it be to be able to handle all these forms of UHD and 4K signals in a product? Using DELTACAST cards and programming interfaces cuts the effort down to changing just a single line of source code.



As a provider of interfacing solutions, DELTACAST engineers commit themselves to taking new technologies in hand as soon as they are available, so that the relevant products are already in our portfolio when you need a solution for these new technologies. As well as these technical considerations, another crucial factor is also at the heart of the success of DELTACAST products in the broadcast industry: when you use a DELTACAST card in your product, it is not only about plugging a piece of state-of-the-art electronics into your computer, it is first and above all about creating a close relationship with your video interfaces provider. For 30 years now, the DELTACAST core philosophy and successful strategy is to act as a partner to its customers, so that our products fit like a glove with yours – just as if they were designed by another division of your own company. This includes direct contacts with our engineering teams, very efficient after-sales service, and a deliberate openness to listen to your story, your specific requirements and your constraints so that we can design, together with you, products completely tailored to your use case. It's the ultimate in creative collaboration and it works brilliantly; just ask any DELTACAST customer!

Europe & UK region update



Darren Whitehead
*Director of Business
Development, IABM*

Following the successful event on Cyber Security in May at the BT Tower, work from the UK Member Council has been focusing on another quality event in Q4 of 2018, news of which will be released shortly.



Of course, in the interim there has been lots of activity and visibility in the UK – the Media Production Show at Olympia, Dock 10's Innovation Day at MediaCityUK Manchester and our networking event hosted by UKTV in London in June. July saw IABM's own Member Day in London and August saw another customer-hosted IABM networking reception, this time by leading London post-production house, Clear Cut Pictures.

Engagement and interaction with customers has been the focus of the summer as the UK is the first region to launch its Industry Advisory Board. The regional Industry Advisory Boards are designed to provide a platform of mutual respect and understanding for continuous dialogue and collaboration between IABM members (suppliers) and their global customers; in short, to bring the buyer and seller communities closer together for the benefit of all by encouraging partnerships between buyers of broadcast and media technology, IABM and its 500+ supplier member companies around the world. Members of our Industry Advisory Boards will help us shape the future success of our industry.

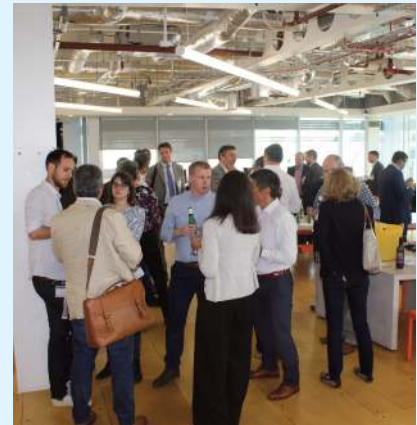
I am very pleased that the response to join the UK Industry Advisory

Board has been very positive – see the full article about it elsewhere in this edition of the Journal.

If you would like to serve on the UK Industry Advisory Board then please contact me directly.

EMEA Members' Council continues to foster community and engagement through its regional newsletter program. The regional Council representatives are now also compiling regional stories for these newsletters – if you have an interesting white paper, customer case study or unique research of insight particular to Europe, please contact me to have it included in one of the EMEA Members' Council newsletters.

EMEA Members' Council is keen to engage with start-up companies across Europe, offering advice and insight into a range of business related topics, such as helping find channel partners/dealers, assisting with growth strategies and offering general commercial guidance. EMEA Members' Council is also exploring relationships with other third parties across Europe on the best way to do this. If you would like to engage with EMEA Members' Council on this issue please contact me directly.



Business and commercial updates



Lucinda Meek
IABM Finance
Director

In this edition of the Journal we have very informative articles from two of our Business and Commercial Partners.

Sharon Daboul from Harbottle & Lewis writes about trade mark clearance searches. Harbottle & Lewis LLP provides strategic and commercial legal advice around the world and is widely recognised as a foremost UK legal practice in the film, television and technology industries, providing clients with advice in areas such as branding, patent licensing and disputes, data privacy, IT law, M&A, corporate finance, litigation, tax and employment law. The firm also offers international advice by working closely with associate law firms around the world.

Mark Hetherington from Leyton talks about creating a culture of innovation. Leyton works with companies to review their technical projects, informing them on what aspects qualify for

government funding across all of Europe. With a presence in over 10 countries worldwide, Leyton is the market leading specialist in what it does and is regularly asked to identify how much a company could receive, something the company become expert in over its 20 year history.

We are delighted that Leyton are joining us at IBC. In 10 minutes, discuss the innovation your business is undertaking whilst finding out how much money you would receive in each year. If this is something that you think your organisation could benefit from please come and see Leyton in the members' lounge at IBC in Amsterdam between 14th and 18th September.

Visit the Business and Commercial section of our website to find out more on how these two companies, along with our other partners, can help you with your business.

Creating a culture of innovation



Mark Hetherington
Market Development Manager,
Leyton UK

Management Innovation



In an ever-evolving sector such as broadcast and media technology, innovation is key to creating first mover advantage and developing a strong market position.

Leyton as an innovation consultancy was set-up over 20 years ago, and over that time has gained experience in most sectors of science, technology, engineering and software. As a business, Leyton was originally French based but now has a presence in 10 countries throughout Europe as well as USA and Canada.

The culture in the different business locations may be different, but the underlying need to create a culture of innovation and an openness to change and transformation within a business is a recurring theme.

Creating a culture of innovation amongst the workforce and developing new, innovative solutions enables businesses to identify opportunities in their markets, exploit niches, find more effective and efficient ways of operating or simply create business improvements. This means being in a position to be a step ahead of other companies and more able to adapt to your clients' needs.

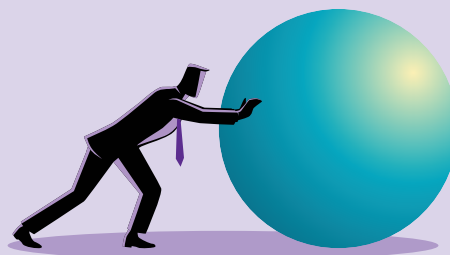
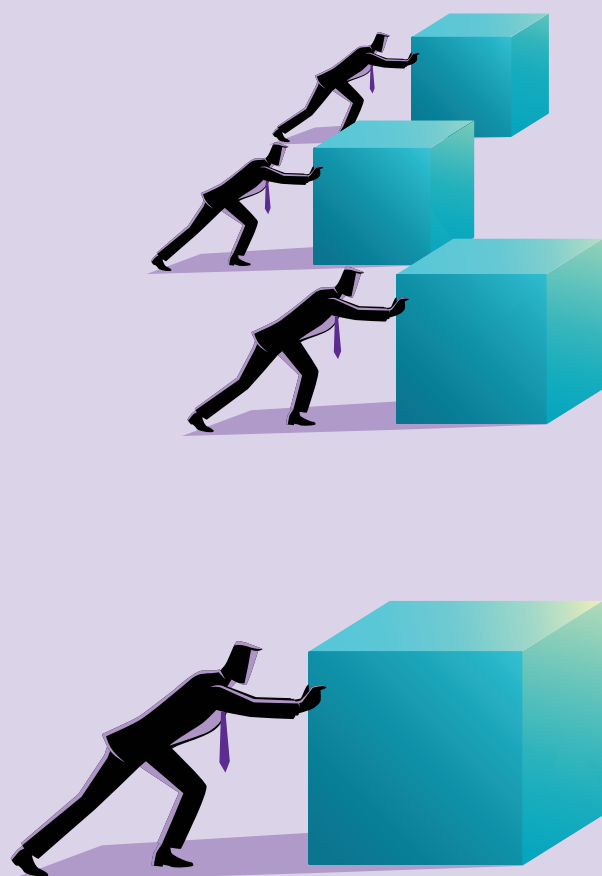
The problem with harbouring an innovation culture and progressive environment is that it can tie up extensive amounts of company resources in people, time and of course money and create difficult investment dilemmas. This is one of the key reasons that innovation is often stifled or shelved, or a ground-breaking project may be reduced in size or scope from the initial philosophy.

Over its twenty year history Leyton has been helping companies with this – working with our clients to understand what really is research and development within their business and all of the relevant component parts from production processes to consumables, software to people. We can then explore where they may qualify for government funding, grants or tax credits – creating a pool of innovation resource that can be re-invested to further the continuous innovation culture of the business.

It's not all about scientific experiments and academic theses and very little of the information we capture on behalf of our clients comes from white lab coats, petri-dishes or smoking test-tubes. Research and development as defined by the administrations offering financial support covers a much broader set of activities. These may be initiated by an organisation directly or as part of a client project. Development and improvement of systems, designs, prototypes, software and processes can all be part of this, as well as the people required to make this work.

We send our technical consultants to work alongside engineers and technical experts in the clients' companies to get under the skin of the business. We want to understand in depth; how they operate, what they are proposing to do differently and where and how their research and development has led them to make this transformation within their business. Having identified every part of the business where the qualifying criteria could be met for innovation, our accountants and tax experts then work to maximise the potential of this and submit a claim on behalf of the client company. This frees up the client company to focus on the core business whilst comfortable in the knowledge that we will be investigating every possible angle to maximise the actual value of their claim we submit for them.

We have saved companies millions of pounds in tax credits by breaking down the component parts of what they are doing and identifying new business areas where legitimate claims can be made. Many of these organisations were totally unaware this kind of financial support was available to them and certainly wouldn't have known how to maximise the potential benefit from it.



So... How does this work?

In the oil and gas community, one client had five engineers working on a project for large oil company in the offshore sector. Their engineers were designing, prototyping and manufacturing a new innovative product. Although the overall project was being paid-for by the oil company the research and development attached to the project belonged to our client. As a result, they were able to make a claim against 25% of the salaries of the five people involved. This released funds that they were then able to re-invest into other new technology – in this case a new milling machine.

An automation systems integrator specialising in increasing and improving the visibility of real time information in manufacturing and processing companies used Leyton to explore the feasibility of their submitting a successful claim. They undertake extensive research and development on behalf of their clients providing solutions on break through activities such as Industry 4.0 and the Internet of Things. The claim process had tied up too much of their own internal resource so Leyton being able to provide specialists to explore this in depth for them was a great step forward. The claim was submitted, successful and within less

than a month, they received the full entitlement in research and development tax credits, which they have been able to re-invest in future innovation.

These are just a couple of examples of how we can work with companies to help them un-cover resource for future research and development and to help them embed a culture of continuous innovation within their business.

Leyton are delighted to be partners with the IABM; the International Trade Association for Broadcast and Media Technology and will be supporting the IABM in offering our services to their membership. If this is something that you think your organisation may be interested in, or could benefit from please come and see us in the members' lounge at IBC in Amsterdam between 14th and 18th September.

If you'd like to book a complementary informal clinic to find out more, please contact Mark Hetherington by emailing mhetherington@leyton.com who will book a slot for you with one of our specialists. Mark will also be available throughout IBC2018 in our Hall 4 (Amtrium) Member Lounge.

In the UK, it is possible to build up 'common law' rights, which arise through the continuous use of a trade mark, even without a registration

Brand clearance – steps you can take to check a new brand before making an expensive mistake



Sharon Daboul
Chartered Trade Mark Attorney
at Harbottle & Lewis

When you launch a new brand, there is always a chance that someone else is already using or has registered the same name, or something similar. If so, it's possible that they could prevent you from both using and registering your mark. Sharon Daboul, a Chartered Trade Mark Attorney at Harbottle & Lewis, gives us some insight into conducting trade mark clearance searches.

1. Why search

Trade mark searching is an important aspect of adopting a new brand. While searching is not mandatory, it will provide useful intelligence on whether your chosen brand is safe to adopt and register as a trade mark.

The owner of the same or a similar trade mark could present a barrier to the use of your chosen brand and they could also object to your trade mark application. They could even go to court to obtain damages for trade mark, design right or copyright infringement or passing off.

The results of a trade mark search should give you some comfort that you will not be infringing someone else's earlier rights. Alternatively, the search might reveal some problems, but you will then have the chance to consider a strategy, before you invest further.

In some countries, such as the US, Canada, and Australia, a trade mark examiner will search the register as part of the examination process, and they may refuse your application if there is a similar one on the register. So, you could save on the trade mark filing fees if you know about any conflicts, in advance.

Searches can also reveal how exclusive your branding is, or whether it's already quite popular in your industry. The more unique a trade mark, the wider protection it tends to enjoy.

2. When to search

An appropriate time to conduct trade mark searches is as part of the exercise that goes with creating a new name or logo, and prior to launch.

Searching can also be important if an existing trade mark is about to be used for a new product line, or in a new country.

Searches may also be conducted before you apply to register a trade mark that you have already been using. Searches should let you know whether someone else has got there first.

3. Where to search

Trade marks are territorial in nature. Each country has its own register and there is also one register that covers all members of the EU (administered by the EU Intellectual Property Office or 'EUIPO').

When adopting a new UK brand, it's important to consider the EUIPO's register for EU-wide Trade Marks together with the UK trade mark register. Trade marks that have been filed or registered with the EUIPO have effect in the UK (at least until Brexit).

There is also an International trade mark system, managed by the World Intellectual Property Office ('WIPO') that allows you to designate the UK or EU as a whole, as part of an International Registration. It's useful to check that register for reference purposes (International Registrations should show up in UK and EU searches).

Trying to check your trade mark's availability all around the world can be prohibitively expensive. It's possible to conduct 'screening' searches, which are searches for identical marks, worldwide. However, most companies will identify their key markets, and stagger their searches accordingly. That helps to avoiding investing in unnecessary searches if there is a high risk mark in a key territory.

4. Types of searches

There are some searches that you can conduct online on the registry databases, which are known as preliminary or knock-out searches. These searches are a fast and

effective way of identifying earlier trade mark applications or registrations that may present an obstacle to your proposed use and registration of a trade mark, without the need to incur the costs of full clearance searches. Such searches might help you to trim down a large list of names. However, such searches will not guarantee that a trade mark application will be successful or that a mark is actually available to use. The searches only tend to check for identical or near-identical marks, and will not identify phonetically similar marks, nor will they pick up unregistered rights.

Full clearance searches will consider applications and registrations covering similar marks. These searches usually involve asking a specialist company to provide raw data, which may come to several hundred pages, and reviewing the results to identify which marks are closest to the proposed mark.

In the UK, it is possible to build up 'common law' rights, which arise through the continuous use of a trade mark, even without a registration. While you may already be familiar with your competitors' marks, conducting such searches is useful from a risk management perspective. Domain name and company name searches can also help to identify the owners of unregistered rights, although trade mark rights do not sit in the company name or domain name itself.

It's also possible to check for logos alone, and for registered designs, although there is no official copyright register in the UK.

5. Conducting a preliminary search

If you are planning to search the online databases yourself, you will need to know the mark you will be searching, the goods and services for which you intend to use the mark, and which countries are of interest (so you know which registers to search). In terms of the goods and services, it's important

to think about where your brand might be headed in future. It may be worth conducting searches that are even broader than the trade mark you might ultimately wish to register, to gain a good picture of the market.

6. Conducting full clearance searches

Full searches do require a level of skill, expertise and experience. A full search may reveal hundreds of results, but that does not necessarily mean that your trade mark is unavailable for use or registration. A careful assessment needs to be made on whether each earlier mark is similar to your proposed mark, and this is done on a visual, phonetic and conceptual level. The goods and services also need to be considered, as it may be that two brands can co-exist, if there is no risk that consumers would be confused between them. An example of a famous brand that co-exists is POLO, used for confectionery, clothing, and cars.

One thing to consider when assessing whether two marks are similar is how well the registered mark is known. The more famous a mark is, the more likely the public will be confused.

The distinctiveness of a mark is another factor. Marks that allude to the goods and services are more likely to be able to coexist, in practice.

7. What if there's a conflict?

If you do identify a conflict, it's worth consulting with a trade mark lawyer before you dismiss your brand, as there may be a way to navigate around it.

When you come to file your application, you must list the goods and services to be covered and you could take the opportunity to limit your list, to minimise the risk of a conflict.

Registering your mark together with a distinctive logo may also reduce the risk of an opposition.

It's also important to check how old the earlier registration is. Trade marks that have been registered for more than five years, that are no longer in use, may be cancelled or 'revoked'. Further investigation might reveal the extent to which a trade mark is vulnerable to cancellation and this might reduce the level of risk associated with adopting the brand.

Investigations might also help to reveal how actively the owner of the registration enforces their rights.

8. Limitations of trade mark searches

All trade mark searches have limitations. For instance, register searches are dependent on the accuracy of the official databases. It's possible that someone applied to register a similar mark a few days before your search, that is not yet available online.

The owner of a registered mark with a reputation may be able to prevent you from using or registering a similar trade mark even if the goods and services are not similar.

There is an international convention that enables a third party to register a trade mark overseas, and claim their filing date as the filing date for a new application. This can be done up to six months after the overseas filing date and could mean that the third party pre-dates you in your territory.

A trade mark that is no longer 'live' can actually be revived up to one year after the renewal date was allowed to pass.

Summary

Trade mark searching is the process of gathering information to assess whether a proposed brand name is available to use and register. It's an important aspect of creating and developing a brand and could help to avoid or reduce the risk of a dispute and/or costly rebrand.



The Importance of Disaster Recovery



Nick Pearce-Tomenius
*Sales & Marketing Director,
Object Matrix*

Never before has media content been quite so valuable. With increasing competition and consumer appetite for content anytime anywhere, broadcasters and content producers are under increasing pressure to deliver the right content at the right time.

It is surprising therefore that so many media companies have not even considered a disaster recovery plan, let alone implemented one. Just how important is disaster recovery and how do you implement a plan that's automated and integrated into the way you work today?

Changing Landscape

Technology has evolved more in the past 20 years than it has in the last 2 centuries. The television was an unprecedented invention that changed the landscape of entertainment for an entire generation. Ever wonder what life would be like without that big

screen that all the furniture points to? Or, should I ask, ever wondered, or forgotten, what it was like when it was just a box with five channels and a broken remote control? The consumer experience is constantly changing. The audience is no longer impressed with a remote control (broken or not), or the ability to

rewind television. The creation of multiplatform delivery has upgraded expectations once again. People expect to be able to watch what they want, where they are, and when they want. It's a privilege that technology has been able to provide. But what does it mean? The competition to impress customers is fiercer than ever, and content is at its most valuable and most vulnerable.

When Disaster Strikes

The thing about media content is that it needs stronger protection. The unfortunate truth is that disasters happen, whether it be a sudden fire that destroys an entire archive, or power outage caused by a burst water main, things can be destroyed in the blink of an eye. Just one example of things going very bad was a fire at MTA International's archives, which caused severe detrimental damage to their files. Despite 70 firefighters working tirelessly, the entire tape archive was totally destroyed. Disasters are completely uncontrollable situations. But what can be controlled? A solid disaster recovery plan can make the aftermath of a disaster that much simpler.

When putting together a Disaster Recovery Plan, it's important to define what a disaster is going to look like for your company. Content is only valuable to a company when it is accessible right? So, realistically it's highly unlikely that an uncontrollable disaster will destroy your office, though as in the cases mentioned above, of course you still need to consider that possibility. But human error? Or a power outage? Operational or human errors account for around

60% of all outages and can cause data to accidentally become unavailable, perhaps even damaged to the point of becoming unusable. This is just as much a disaster as the uncontrollable kind, because your content is worthless during the time it is inaccessible.

Perhaps surprisingly, processes are normally brought to a halt by a drop in the local network, the loss of your MAM, DAM, or PAM, or the production storage going offline. Naturally, it is important to ensure that no matter what, you can still provide content, and metadata, to multiple platforms, make sure that your post-production workflows run uninterrupted, and trust MAMs, DAMs, and PAMs to keep things moving.

What should a Disaster Recovery Plan look like?

What makes a successful disaster recovery plan? We are already aware that anything that prevents a company from accessing its content should be considered a disaster. The best solution to this is to properly store your files. This includes a back-up system of every tape and file in your system. Even your archives should be correctly backed up. This works as a support for your primary source of content. Sometimes the best place to keep your secondary data is up in the Cloud, which can be easily achieved. This means that if, god forbid, your archives go up in flames, you have completely indestructible files that can be easily accessed.

Thankfully, in the case of MTA mentioned above, the broadcaster had planned ahead. A disaster recovery plan meant that all the

files destroyed had already been duplicated and kept in an alternative location. This meant that MTA had complete access to its archives, despite such an unfortunate occurrence. MTA's Disaster Recovery consists of MatrixStore object storage split across two sites and connected remotely, which means that should another disaster strike in either of the sites, media assets can be restored from the other sites. This is thanks to MatrixStore replication, which ensures assets and metadata are automatically protected at remote locations to ensure content can be accessed should anything happen to the original, local, version. The keys to a good replication solution are: flexibility, so it can integrate with any system; simplicity & automation, to avoid human or technical errors; scalability, as everything changes and grows quickly in this industry; independence – data and metadata must be future proof and accessible using tools other than those that archived the content; and availability, so that you can access your content instantly in the case of a disaster.

So what is a disaster? Anything that interrupts your access to your content. The way to resolve this is to have a recovery plan that is fully functioning. Protect your data and metadata before it even needs protecting. It's shocking that this isn't already a well understood subject in the broadcast and production world, but media corporations appear to be becoming more aware of the accessibility value of their content. The importance of a disaster recovery plan is undeniable.

With some 1700 exhibitors, 57,000 visitors and 30,000 senior decision-makers all congregating at the RAI, getting your message heard isn't easy

Five communications tips for IBC2018 exhibitors



Rob Ettridge

*Partner at PR agency,
Red Lorry Yellow Lorry.*

How do you stand out from the crowd in the madness that is IBC? Rob Ettridge, partner and chief client officer at Red Lorry Yellow Lorry, gives five communications tips to help you get the most out of exhibiting at the show.

With IBC2018 nearly upon us, is your marketing and communications activity ready to go? With some 1700 exhibitors, 57,000 visitors and 30,000 senior decision-makers all congregating at the RAI, getting your message heard isn't easy. But over the years, we've learnt a few tricks along the way to help you stand out.

Here are five communications tips to make sure your voice doesn't get lost in the noise.

1. Have a reason to engage on hot topics

Every year there is an industry hot topic – think 4K, cloud or IP. One of this year's buzz topics is likely to be artificial intelligence (AI). With potential uses for AI almost limitless, you probably want to join the conversation. But you can't simply join the chatter for the sake of it – you need a reason to engage. You won't stand out by saying the same things as everyone else. Be original – you need a USP or a differentiator, and importantly it should be relevant to what you do. If it isn't, don't try and shoehorn your way in, as customers, prospects, analysts and journalists will know.

2. Make sure your message is crystal clear.

Think carefully about your message – and then make sure it's clear to you and everyone around you. You need to know exactly what you want to say – and so does everyone else in your business. Develop a simple, pocket-sized show messaging booklet, make it mobile or iPad friendly – and distribute it to every employee on your stand. Whether you're meeting with customers, prospects, journalists or analysts, it will ensure you're all singing the same tune.

3. Be opinionated.

It shows you're confident in your message and sure about what you want to say. Journalists will hear lots of talk about the same technologies (eg AI) and it gets pretty boring hearing people saying the same tired things. So be bold – having opinions keeps it interesting and helps you stand out from the crowd. Just make sure you can back up what you're saying with proof points – eg awards, industry research or customer endorsements.

4. Use case studies.

Using real-life examples is the best way to show what your products can do. Written and video case studies of people who have actually used your products – and learning what they have done for them – is always more interesting than hearing about what it might be able to do. Of course, that's not always possible with new products, but showing the benefits of a new product is much better than listing its features. Or get a beta customer or industry analyst involved, as that will carry much more weight.

5. Tailor your message.

Technology can be complex, and everyone has a different level of understanding – and a different requirement. You can't just recite a script about a new product. Are you addressing engineers, chief executives, general managers or end-users? Find out – and adapt your message. And if you're face to face and you don't know their interest, position or level of understanding – just ask and flex the message.

Check out our podcast for more information on how to stand out at IBC:

www.rlyl.com/en/techcomms-podcast-ibc-2018/

New platinum member – V-NOVA



Guido Meardi
*CEO and Co-founder,
V-Nova*

How a group of friends
is making the future of
digital come alive



When and why was V-Nova founded, by whom and with what objectives?

V-Nova was founded in 2012, though it was in incubation for a couple of years before that. There are four cofounders, who are, first and foremost, a group of friends. V-Nova believes in making the future of digital come alive via better compression – bridging the gap between what we'd like to be able to do and what's possible today. We have re-thought compression algorithmically from the ground up; we use what's already there – the hardware blocks that are built into devices – we just unlock their power. There is so much power built into devices that are already in use around the globe, so what we do will benefit 100% of people now. Our PERSEUS Plus technology is also backwards-compatible as well as uplifting the quality of services in new devices, so everyone's better off with PERSEUS.

The group of friends had legacy experiences in the sector – the idea for V-Nova just came out of taking seriously the fact that a new coding approach could truly work at scale within such a complex ecosystem. The reality is that many other people likely had similar ideas to ours, but there's a big difference – and huge investments – between having a good idea and doing it for real. Some of the technologies we're tapping have been optimized over the course of three decades; to do what we needed a lot of courage, some inner madness, lots of funding and a lot of hard work too.

What role do the investors play in the strategy and running of V-Nova?

Funding a company like V-Nova is hard, especially on this side of the ocean – we quickly realized it wasn't going to be a simple venture.

I was the first and largest investor for the first funding rounds, which proved very helpful because I was good at convincing myself and my wife! Other people seeing my commitment, starting with my co-founder partner-in-crime Pierdave who was the second largest Series-A investor, sent out a clear and positive signal to allow us to collect a very good group of investors. We now have around 120, including institutional investors, strategic partners and UHNI: they are extremely helpful and provide a lot of value-add in terms of strategy, networks and customers. For instance, the legendary Federico Faggin, father of the first microprocessor and of the touch interface, injected a lot of his Silicon Valley experience and is a constant source of invaluable insight, advice and support.

Our strategic investor partners – Sky, Eutelsat, Whysol Investments and Limitless Earth – started coming on board in 2016. They have used our technology in projects or portfolio companies and wanted to stay close and be the first to benefit from the upside as our development continues.

Why the name 'PERSEUS' for your principal product – is there a story behind it, as well as the V-Nova name?

When we created our first prototype in 2010 we were surprised that it delivered such substantial performance, and we needed a product name for a video call with Jeremy Doig of Google, where we would ask him if our idea had legs. In 2010, Clash of the Titans was riding high at the cinema box office – showing PERSEUS as a great hero, taking help from higher powers and facing down tough challenges. There was our product name!

Our company name and logo also has meaning – V is the core of the algorithm that leverages processing power hierarchically, and is also the best way to encode for all kinds of data – not just video; Nova is a famous Italian diaspora acronym, also used by the Italian MBA Association, of which I'm a Director. Even our logo has meaning. It was designed by Pininfarina and brings together profound, ancient symbols of creative power, engineering, positivity and maths which together represent advancing the world by innovation, in a way that is both simple and non-trivial. You asked!

In which parts of the content chain does V-Nova's PERSEUS technology play?

PERSEUS spans the entire video content chain from professional video contribution and live production to delivery to end users.

PERSEUS is not just a single codec but a family of products. The fundamental technology has been modularised, and can now be implemented in a number of different applications without creating too much complexity – we are also applying it in the aerospace industry for example. PERSEUS Pro is aimed at visually lossless professional video, as alternative to JPEG2000, ProRes or HEVC. PERSEUS Pro is the first commercial codec format to leverage neural networks and machine learning in a real time codec, which makes it the fastest and most efficient codec on the market.

Meanwhile, PERSEUS Plus is a different 'flavour' of PERSEUS aimed at delivery to end users. PERSEUS Plus works in combination with other codecs such as AVC/H.264, in order to be supported by low power devices even including 15-year-old set top boxes. PERSEUS Plus has been devised to bring quality and processing power efficiency benefits to AVC/H.264 as well as any other codecs (including HEVC, VP9 or AV1), so it is future proof and agnostic to the baseline codec. Today, PERSEUS Plus AVC unlocks the possibility to reliably deliver high quality services to everybody at the lowest costs, and it is so light that it can be decoded by all browsers plug-in free using simple HTML5 scripts. This is because it isn't strictly speaking 'software decoding': PERSEUS Plus leverages dedicated hardware blocks for both the baseline codec and the PERSEUS data, a bit like playing back a video with blended augmented reality graphics.

We also operate in the middle of the broadcast chain. At IBC we're introducing a product for primary distribution especially focused on lowering cost and barriers to UHD

Our PERSEUS Plus technology is also backwards-compatible as well as uplifting the quality of services in new devices

distribution. It is also backwards-compatible with standard HD receivers, because a PERSEUS Plus AVC UHD channel includes a fully compliant MPEG-4 HD channel, decodable by a PERSEUS-unaware decoder as HD. This lowers the cost barriers to launching UHD channels by up to 33-50%, and can play a big role in 'feeding the chain' of UHD.

Lastly, at IBC we are also showcasing the benefits that PERSEUS can provide to imaging. In particular, we will be showing how PERSEUS Pro can triple the responsiveness of image-rich User Interfaces and websites, such as the ones used when viewers have to browse a VoD app or website.

What are the unique benefits of PERSEUS over other compression alternatives in each of these applications? What makes V-Nova different?

PERSEUS is very fast, has low complexity, and delivers demonstrable results in real-world applications – not just theoretical scenarios. When you want to transmit a live football game, you need to cut corners due to processing power constraints and stay within bitrate limitations – PERSEUS meets this requirement, and the harder you need to push it (e.g., the higher the resolution or frame rate), the bigger the advantage over any other system. Put simply, PERSEUS enables the delivery of better quality to more people at a lower cost.

Backwards-compatibility is also a unique attribute of PERSEUS. It means that – unlike other new compression schemes – you can deploy now rather than wait 5-6 years for the right silicon to be developed and then fitted in enough devices to make it viable. PERSEUS Plus can be deployed at scale very rapidly, with a single ABR ladder delivered to 100% of devices.

Other compression schemes such as HEVC or AV1 also have potential liabilities which make them unattractive to companies who don't want to have to worry about potentially being hit with intellectual property [IP] royalty/licence payments covering millions or even billions of devices. With PERSEUS, no commitment to new codec-specific hardware blocks is necessary, so the royalty fee is 'already paid for', because it is included in the general-purpose graphics-capable silicon. The IP liabilities and risks don't arise: PERSEUS just works like any other piece of software.

In short, PERSEUS Plus AVC is the most licensing-friendly next generation codec available, and it is as low-cost and risk-free as it gets: the royalty for device enablement simply does not and cannot exist, which

understandably is even better than the AV1 promise of royalty free dedicated hardware blocks. In fact – as already pointed out by some large corporations that claim AV1 is infringing on their patents – any new application-specific hardware block may always infringe on some submarine patents and generate multi-billion-dollar liability risks for device manufacturers.

What's next for V-Nova? Can you tell us what you will be launching at IBC?

V-Nova is a very innovative company, we are all about making the future of digital come alive at the most efficient cost. At IBC we will be talking about delivering 1080p50/60 and UHD today, for instance leveraging machine learning and neural networks to achieve visually lossless intra-only UHD HDR at just 130Mbps – this compares with around 500Mbps for HEVC-I, for example – and primary distribution UHD HDR even below 10 Mbps, so lowering the cost per channel and enabling UHD to be pushed to affiliates inexpensively. We will be showing how thanks to our non-linear-editing PERSEUS Pro plug-ins and our open source stack PERSEUS Plus integrations (or even just trying) PERSEUS is easier than ever. We're also showing a cloud proposition for OTT distribution that includes inexpensive transcoding microservices to help speed of adoption and profitability of OTT and VoD services. We will also be showing how PERSEUS Plus AV1 can help speed up the viability and adoption of AV1. And then there's the imaging proposition, a simple and inexpensive way to deliver distinctive user experiences across the whole customer journey...

You've recently upgraded your IABM membership to the highest level – Platinum. What are the principal benefits to V-Nova from your membership?

IABM is a great organization – the whole package has great value for us. Networking and collaboration are very important to V-Nova, enabling us to get wider and faster adoption for our technology. To do this we need to work more and more with the industry, and IABM provides a great platform for collaboration and relationship building as we continue to grow. There's a great calendar of events too, which gives us more visibility to show who we are and what we do. The business intelligence is also very useful for our planning and signaling where to invest; it helps us pick our battles – we can't do everything!



PROMOTE YOUR COMPANY

IABM provides a wide range of opportunities to promote your company across the broadcast and media industry

- Send us your press releases for our news pages
- Enquire about speaking at one of our thought leadership events, webinars or seminars
- Attend our networking events
- Apply for an IABM Award
- Advertise in our publications
- Provide content for our publications
- Sponsor or exhibit at an event



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From hidden gem to crown jewels: new IABM Director North America lays out the way forward



Kathy Bienz
IABM Director North America

In August we announced the appointment of Kathy Bienz as our new Director North America. Kathy is already deeply engaged in her new role, taking over from Caryn Cohen, who has served so effectively in this role for the last four years.

An Electrical Engineering Technology graduate, Kathy has more than 20 years' experience in the broadcast and media industry with major players such as Grass Valley, ChyronHego, Imagine Communications (and during its prior years as Harris Broadcast, Harris, Leitch Technology) and Snell Advanced Media (SAM). She has worked in a wide range of roles including product management and marketing, channels management, field marketing management, marketing communications and was most recently Director of Marketing, Americas at SAM.

We took the opportunity to talk with Kathy about where she sees the industry going, how she sees IABM and what she is planning to grow the take up of services by member companies – and her message to companies that aren't yet benefiting from IABM membership.

What gets you up in the morning?

"What has always driven me is helping people – putting them in better positions. I have been fortunate to work in many different roles in several companies in my career to date in broadcast and media technology.

"Earlier this year I thought I'd try a venture into a new industry, but I really missed the broadcast business, having been in the industry so long. I know so many people, companies, workflows, exhibitions – the ropes of the whole industry are in your blood. Our industry impacts every set of eyes in the world, but the number of companies and people in it are relatively few and close – a community with which you develop deep relationships. It's a real family – while people may move around from company to company, you still maintain the connections. So, when I was approached about taking up this position back in the engine room of the industry with IABM, I leapt at the chance and I'm thrilled to be back!

"I also happen to live in the suburbs of St. Louis in the heart of the U.S. – which is a great springboard to easily reach all parts of North America, and I intend to take IABM's message to every corner of the continent."

What special skills and knowledge are you bringing to your new position?

"My experience of so many roles with a number of major players in the industry has given me a great insight into what makes companies tick – and what makes them successful. I've worked with engineering, production, customer service, sales, marketing and finance teams, and I have learned that cross-functional collaboration between departments and individuals is key to success.

"Strong relationships with SIs and dealers are also vital – they are relied on by many end-users. Vendors need to help channel partners to be as well informed as possible, both with what they need from the vendor and how they relate to the end-user. Channel partners often represent dozens of companies – how do you as a vendor stand out? End-users too; understanding workflows and challenges – what they need to be successful – is an art. I hope to be able to apply my experience in this to show members how they can better tap IABM resources to enhance performance in these areas."

What is your message to IABM members and the wider industry in North America?

"Changes in the industry are coming faster and faster. People need to adjust their business strategies to accommodate these rapid changes and that's

where I am so excited about IABM's role – we have so much that can help them short-cut these. For example, the Business Intelligence reports – we do the work, so they don't have to; we supplement their own efforts. For example, our Buying Trends and Supply Trends reports give members an authoritative view of what buyers are actually focusing on – all this for a membership cost that is about the same as the cost of a half page advert in a trade magazine! You couldn't source a contractor to deliver this kind of business intelligence for the price of IABM membership – let alone get all the other benefits too.

"So my mission is to help members in North America maximize their engagement with all we have to offer – and to help companies that haven't yet taken advantage of membership understand its enormous benefits and cost-effectiveness. I'm fortunate to have many technical, sales, marketing and management contacts across the industry to help me do this.

"The perception of some North American companies is that IABM is primarily Europe-focused. Thanks to the formation of the Americas Members' Council a few years ago, and the drive of my predecessor, Caryn Cohen, we have made great strides to change this, but there is still much more work we can do to demonstrate the international relevance and benefits of the IABM.

"I'm also impressed by the depth and breadth of training and education IABM offers – much of which comes as part of the standard membership fee. It's another powerful tool offered by IABM, helping members keep up with the changes in the industry. With the influx of IT technology, we need people to be trained across both the next-frame imperative of broadcast and the enormous potential of correctly applied IT in meeting new needs and providing a platform that will sustain changing business models into the future. Education and training is another resource that really differentiates IABM.

"There are also extensive networking opportunities members can take advantage of to share experience and best practices. Today, solutions need collaboration as never before, and IABM provides many opportunities for increased understanding and partnering up. I'm looking to create more networking events in North America, working with members across the continent."

What is your message to IABM members and the wider industry in North America?

"To be joining just as a new Americas Members' Council is beginning its two-year term is perfect timing for me. I already know several of them and am looking forward to meeting them all at IBC. Members' Councils are a great forum for members to first look at their own companies' engagement with the myriad of IABM offerings and how to utilize them fully – I will start working from the inside out; such as reminding them that all the valuable content on the IABM website is open to everyone within a member company. Via the council I can also learn more about the specific requirements of Americas companies, so I can be their facilitator within IABM to help support their strategy and growth plans. All in all, IABM is a great way to grease their skids so that they can move smoothly and effectively ahead."

What are you planning to boost end-user engagement?

"IABM already offers its members great visibility to the end customers – the new BaM™ Shop Window is a major step ahead on this front and, I am certain, will quickly become a fixture in end-users' browser favorites. Members can also benefit from exposure at the high-profile events and round tables IABM offers – the show-opening breakfast events at NAB and IBC are great examples, as are the free-to-enter BaM™ Awards, and round tables and interviews on IABM TV. And then there's the member lounges and meeting rooms at major shows. Many companies with small booths simply do not have space for meeting rooms and these are a significant benefit – and well-used too."

And finally...

"IABM is still a bit of a secret in North America – a hidden gem. My mission is to show member companies the extent of exclusive member benefits on tap – and to open the eyes of companies that aren't yet members to the fantastic range of support and services to help their businesses prosper for just a very modest membership fee. I am looking so forward to it!"

We have targeted football but we also have solutions for tennis and other international variants of football/rugby

Starting a new business: how Salsa Sound is cutting through the noise



Dr Rob Oldfield
Co-Founder and
Director of Salsa Sound

IABM introduced a new 'Start-Up' membership category in January this year. As its name suggests, the new membership category is designed to cater for new companies that have been incorporated for less than two years, enabling them to benefit from the full range of IABM membership services to support them at a critical time in their growth and development, all at a manageable price for what are typically cash-poor, ideas-rich businesses.

We spoke to Dr Rob Oldfield, Co-Founder and Director of Salsa Sound – who took advantage of Start-Up membership this year – about his experiences in getting his new venture off the ground, and asked him for his advice to other entrepreneurs on how to get started and get noticed in the broadcast and media industry.

Give us a brief overview of what inspired you to set up your own company – where do you see the opportunity in the market, and why?

At Salsa Sound we are producing technologies for the automation and enhancement of audio mixes for

live sports audio, making the experience more cinematic, engaging and immersive for viewers. Having originally developed this technology as part of a university research project, we recognised that our solution could be of great benefit for current as well as future broadcast workflows. So, leveraging the IP from this project, we launched Salsa Sound to help broadcasters bring innovation to their audio production, using AI to automate some of the mixing processes and enhance the sounds that are often missed but which are so crucial to the match narrative.

With broadcasters wanting to put their viewers more in the heart of the action and continually looking to innovate in the market, we see our technology fitting in perfectly. Additionally, our tech is object-based/NGA ready as part of the core native technology on which it is built, so we see more markets emerging for us as this tech becomes more prevalent. Initially we have targeted football but we also have solutions for tennis and other international variants of football/rugby.

What are the most rewarding aspects of launching a new company and product?

It's great to see the technology that we have spent so long developing and honing being used in the 'real world' and people benefiting from the enhanced audio content that we offer. Innovation is something that I have been passionate about since I was a child; from making home-made three





wheeled cycles to bespoke rabbit hutches, I enjoyed producing new designs for people to use and benefit from. Being able to invent and innovate now as part of my job and business is very rewarding.

What challenges did you face in getting started?

One of our biggest challenges has been the time that it takes to get innovations to market and even when they are ready, it takes a long time for companies to run the necessary trials to give them the confidence to purchase – this is even harder for brand new companies like us.

With over 1500 vendors jostling for attention at major shows and in the press, how have you set about getting noticed by potential customers?

Where possible we try and make direct contact with our potential customers in the months running up to the show, and try to meet before the show as well as during it so we don't get lost in the noise. We are in the fortunate position of having a unique product offering so it is easier to get the attention of our potential customers.

Based on your experience, what key pieces of advice would you give to someone considering starting their own company in the media technology business?

Do it! It takes courage, it's risky but it is exciting to do the things you're passionate about and is incredibly rewarding. The broadcast industry is a great industry to be involved with and we have found the people and companies that we have met on our journey incredibly supportive and friendly.

You have taken advantage of IABM's Start-Up membership package. Which are the most useful services to you, and how have they helped you?

The industry insight and training opportunities are something that we find extremely useful and to have the support of the IABM, especially at tradeshows, is great. We relish the opportunities that the IABM creates to meet and network with other industry leaders and to create business relationships that help guide and strengthen our business.

IABM members speak – Advanced Media Trading



Alaa Rantisi
*General Manager,
Advanced Media Trading*

We spoke to Advanced Media Trading's General Manager, Alaa Rantisi, about what his company offers, what drives its success, and the challenges and opportunities in the Middle East market.

Advanced Media Trading is one of the Middle East's largest suppliers of broadcast, professional video and photography equipment and accessories. Who are your main customers and what are the key services that you offer to them?

Here at Advanced Media we offer a wide range of digital cinema, broadcast, professional video and photo equipment and accessories. We offer professional products, media solutions, consultancy and after sales service. Our customers are mainly TV stations, rental houses, producers, filmmakers, freelancers and professional hobbyists, as well as corporate clients including government organizations and educational institutes. We also deal with many retail shops and electronics stores through our distribution division.

What are the priorities of your customers (what are they looking for?) and are they different from past priorities?

Our customers are looking for latest trends and technologies in the industry – better and higher quality products! They expect us to be first and leaders in bringing these technologies to Dubai.

Priorities have also changed with the rapid evolution of the video market, and overall broadcast solutions are mostly dependant on IT. Due to the rise of social media, the Vlogger and

hobbyist markets have grown, and most of these customers are looking for compact, cost effective and multi-operation-oriented equipment.

Congratulations on winning the Digital Studio 2018 'Distributor Initiative of the Year' award. What does this award mean to Advanced Media Trading?

It was nice to participate in Digital Studio Awards again. It was a good chance to catch up with the people in our industry. We were happy to win this award again and add it to our collection.

How does the business landscape in the Middle East differ from other regions like Europe and USA?

The US and Europe markets adapt to changes faster. They're usually the leaders in terms of upgrading to the latest and making users adapt to the new technologies. They also benefit from a bigger market in cinema, sports, events, entertainment and so on.

What challenges are you currently facing in the market?

The main challenge is market saturation and the slow financial cycle; most of the large broadcast organizations are hesitant to invest in technology and consequently it trickles down to the smaller organizations – the suppliers.

The US and Europe markets adapt to changes faster. They're usually the leaders in terms of upgrading to the latest and making users adapt to the new technologies



What new creative opportunities are becoming possible in the market?

More content creation with the rise of alternative media channels. Creative and high quality content for more and more streaming channels and devices have given an opportunity to both suppliers and content creators.

Advanced Media and IABM offer product and technology training courses. Do you find a need for training and skills development in the market?

Yes, of course. This is what we have been doing for many years already, specially over the last few years as new technologies emerge such as the upgrade from HD to 4K and HDR and so on; similarly from SDI to IP. Training and seminars are very important to continuously educate ourselves and our customers in the latest technologies.

What is your approach to customer support?

We offer a unique hands-on experience for our customers in the showroom. We display our latest products in local video and photo

exhibitions. We have a strong social network and website to bring all the necessary product updates and information to our customers. Moreover, Advanced Media's service center is the Authorized Service Center for most of the brands we distribute in the region. Our team of engineers are certified professionals who share their technical expertise and are committed to resolving any technical and maintenance issues.

What do you see as the next big evolutionary or revolutionary step?

The transition from SDI to IP could be the next big evolution in the industry. Virtual machines, remote production and software will take over from conventional hardware, changing the concept of broadcast workflows. Moreover, Netflix, Facebook and Shahid could be trendsetters in the market.

What IABM member benefits are most valuable to Advanced Media Trading and why?

IABM not only gives us access to a wide range of resources, but also it is a great platform for us to introduce our company and its services.

IABM members speak – Dayang VP International Business



Zhang Zhijun
*Dayang VP International
Business*

Dayang was founded in 1989.

Dayang is a subsidiary of a public company
Da Heng Technology (Stock code: 600288)

2. What is the setup of the Dayang facility in Beijing and how much R&D is done?

Dayang Technology Development Inc. is a world leading 'pan-media Technology and Service provider', provide comprehensive, full perspective, full coverage products, technical services and system integration solutions to broadcasters, news agencies, OTT service providers, production companies, self-media producers, government, education, medical institutions and other organizations. Dayang products have been sold nation-wide in China, as well as international market, e.g. South East Asia, Europe, Middle East, Africa, North America and South America.

3. Can you explain the broadcast solutions that Dayang are offering?

Dayang has more than one thousand employee now. Dayang has established approx. 100 techical center, branch offices and sales offices across China. Dayang has also established multiple subsidiaries, e.g. 'Dayang International', 'Dayang Information', 'Dayang Media', 'Ke Li Tong', 'Nanjing Houjian', 'Dayang Rongyun', etc.

4. Since Dayang's inception, how has the company adapted to the change of technology within the broadcast Industry?

Dayang has mainly 8 product lines.

1. Post-production products
2. E-series products including non-linear editing system, digitized media management software, etc.
3. Studio and Live graphics

4. Media management platform, including transcoding, achieving, etc.
5. Playout system
6. Modular products
7. Cloud-based service products
8. Convergence media platform

5. Dayang is famous for the development within the broadcast sector. What other parallel markets is the company involved in?

First of all, we appreciate Chinese broadcast customers' support to Dayang over the years. Also thanks to IABM for your recognition on Dayang. Besides broadcast market, we have also developed business into other industries, e.g. education, medical institutions, museums, and aerospace, aviation, public security, law enforcement, etc. Whenever there is a need for video, audio and media-related applications, we are devoted to provide a complete and solid products and solutions.

6. What problems have you faced expanding internationally as a Chinese company?

Dayang has pioneered the development of character generators, non-linear editing equipment and completes digital networking systems for the Chinese market with full international compatibility.

Manufacturing and production are ISO-9001, 3C and CE certified, which ensures the highest standards of design, assembly, testing and delivery. Dayang has a high reputation worldwide for reliable, scalable and cost-efficient products combining versatility with easy operation.

In the new convergence media era, Dayang has set the company strategy to keep the foothold in broadcast, actively build internet+ video platform, develop internet video technologies and products, provide products and services to all industries. Dayang has acquired Nanjing Houjian software limited, and combine the product lines quickly in order to provide competitive all-media solutions. In 2017, Dayang has established the strategic partnership with People's Daily media technologies limited, co-developed People's Daily 'central kitchen' system for editorial coordination and management. Dayang has also setup Dayang Rongyun technology limited, and formed the strategic partnership with Tencent, Baidu, Amazon, formally entered into cloud-base service sector, and released multiple media cloud-based products.

7. Where are your key areas of focus for sales outside of China?

As a Chinese company, when developing international company, we have been facing mainly 3 issues.

First, as you may know, many overseas customers have perspective and biased opinion to Chinese brands and companies. Some of them think China is still at 70s or 80s last century. They don't really know China, Chinese companies and our recent progress in technologies.

Secondly, Dayang is lack of overseas organizations. Right now we don't have branches or offices in many countries. We mainly sell through reseller networks. Many customers hope they can get local support. We are trying to work with our resellers to provide better services.

Last point is about the specific users requirement from international market. Our domestic users have quite different mentality and user Conventions. We have done overseas research for many products. We support product customization for overseas market. We have also support multiple languages.

9. Where do you see the Dayang moving forwards?

In 2018, Dayang will continue internet 'Video+' corporate strategy, exceed the limitations of current technology and production workflow, make a leap in terms of business development especially in the way of thinking, seize the critical opportunities in media convergence, then pass through the new concept to customers. Based of this strategy, our performance and market share has grown dramatically. Dayang CEO Mr. Li Jiang proudly stated "why do so many customers choose Dayang? It is because our solutions are to help customers achieve their successes. We don't only make money, we target to build win-win relationship with customers."

In 2018, Dayang is trying to seize the opportunities on the market, develop new market segments, following the trend of media convergence, 4K and IP development, seek to grow the business. Meanwhile, internally Dayang is also adjusting organizations, focus on micro-management, light-asset, flexible teamwork, better implement the internet 'Video+' corporate strategy.



IABM members speak – Blackbird



Ian McDonough
CEO, Blackbird

We asked Ian McDonough, CEO at IABM member Blackbird, to tell us a bit about this apparently new name in our industry.

We asked Ian McDonough, CEO at IABM member Blackbird, to tell us a bit about this apparently new name in our industry.

Forbidden Technologies could really be described as a customer-centric R&D company for many years, led by our founder Stephen Streater and his visionary team. They were correctly convinced by the future of the cloud and so they focused on significantly improving the video experience on the internet for all – consumers and professionals.

Coming in as CEO last year when the ground-breaking technology was so advanced and the world has shifted so dramatically towards the cloud is what attracted me most. Although we are still working on B2B2C technology, we have Blackbird, our ‘video workstation experience in the cloud’ for any businesses that work with video, across any sector.

Back in March, we elevated Blackbird to be the master brand because it helped highlight the main point of differentiation between us and any other cloud-based platform – namely our cloud-native Blackbird proxy codec.

Our unique and patented Blackbird codec allows us to reach what many believe is the holy grail of video production – the workstation experience in the cloud. It provides all the benefits of a bespoke, on-premise experience such as a rich variety of highly-responsive, frame-accurate, precision tools with the enormous advantages of the cloud which include remote working, non-linear collaboration and an SaaS cost model.

20 years ago, most people wouldn’t have imagined the enormous opportunities and new directions the Internet would open up – but being a trailblazer isn’t always comfortable. How did the company manage expectations – and avoid the trouble so many other dot.com boomers hit?

We are a lean, AIM-listed company with a broad base of institutional and private investors including my family in

the most recent fundraising – none of this could have been achieved without all their support. In addition, we have a solid customer base in the UK and US across news, sports, eSports and post production who have worked closely with us to hone the Blackbird suite of products to be the lightning-quick, precision tools they are today.

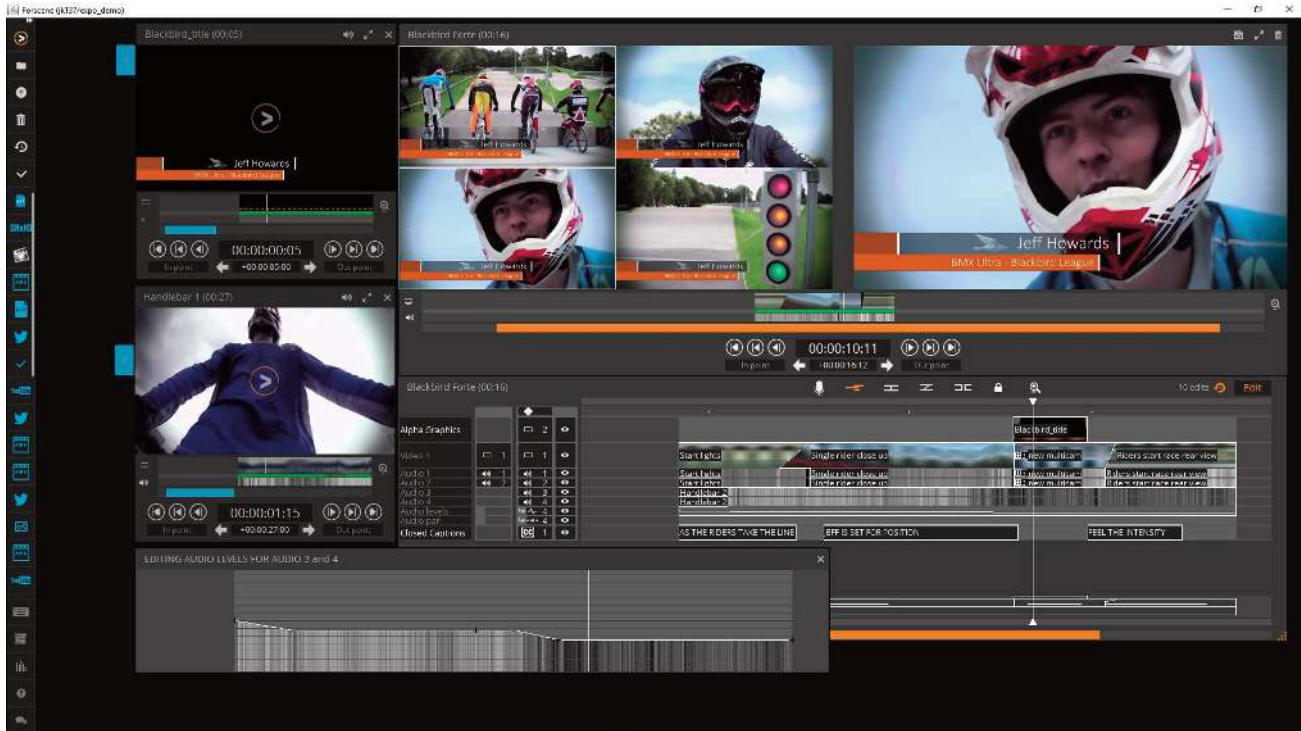
We have also been very fortunate to keep our core developer team together over a number of years – all of whom have a deep understanding of how Blackbird and its digital production toolsets have been built.

Thanks to these various stakeholders, what we have is a world-leading, unique technology that has been developed at a fraction of the cost of less appropriate solutions built by large corporates. We are now very excited to embark on our next stage of growth and deploy Blackbird as part of infrastructure as a service within an OEM model across the US and beyond.

Please give us a brief overview of your product range.

The Blackbird product suite ranges from basic level Blackbird Edge and Player to Blackbird Forte for advanced video professionals.

The Blackbird Edge and Player: Edge is the foundation technology for our product line – allowing users to accelerate the visibility, immediacy and manipulation of video content for workflows across the media supply chain in the cloud. Our Blackbird Player provides access to the renderless ability to instantly review and publish content and edits within the Blackbird cloud using the frame-accurate and frictionless control experience of a browser. The player can be embedded into internal and external websites or shared as links for playback on desktop, tablet or mobile browsers.



Blackbird Ascent: is designed for professionals who are not editors such as marketers, journalists and social media experts enabling them to frame-accurately create event highlights from live or recorded sources and rapidly publish them to the web.

Blackbird Forte: is designed for professional editors and is a fully-featured cloud-native video editing system which allows teams to hyper-accelerate the delivery of video content across the media supply chain with a market-leading suite of management and manipulation tools.

Blackbird API integration: we have integrated with Artificial Intelligence (AI) provider Veritone to give our customers access to 300 AI engines from transcription, translation, to facial and logo recognition and many more.

Tell us about the range of applications your customers use Blackbird technology to solve, with examples as appropriate.

There is a multitude of ways in which Blackbird can dramatically enhance the video management requirements of any organization:

Blackbird enables the ultra-fast publishing of edited highlights for live sports, eSports and news to any platform such as social media channels.

As a web-based platform agnostic, cloud-native application that requires no hardware investment, Blackbird enables production teams to access and edit

video content via any browser using any device from anywhere in the world for easy, collaborative working.

Blackbird is very fast – its patented super low-latency codec allows users to access and edit video content within the cloud to deliver a true workstation experience. Users enjoy hyper-fast, frame-accurate navigation, playback and viewing of large volumes of video in the cloud without any delays using bandwidth as low as 2Mb per second.

The days of uploading and downloading all hi-res video around or into the cloud are now over. The Blackbird proxy is created faster than real time and the unique multi-directional codec enables users to work on the content needed – saving production teams significant time, bandwidth costs and frustration.

These unique strengths of Blackbird are the reason why major media companies such as TownNews.com, MSG Networks, Gfinity, BBC, Our House Media, Dragon Touch Systems, Deltatre, Fanview and ESP Gaming trust the technology extensively.

Partnerships with fellow technology vendors, cloud platforms and solution providers are clearly important to Blackbird. Tell us about how you manage these – in some cases there must surely be competitive issues?

Neither Adobe or AVID have true cloud workflows so we would not position ourselves as competitors – we provide a complementary solution. Blackbird integrates with both of these systems, which gives our customers

an option to work with Blackbird and their existing video editing tool. We have on occasion though replaced Adobe, AVID and EVS workflows – however these are the exception rather than the rule.

With technology vendors such as Veritone, we are finding that we are very complementary. Our unique Blackbird codec is very attractive as a way of giving visual form to their specialist AI functions.

All our resellers tell us that in our cloud video production niche, we don't have any true competition. Nobody else has the ability to provide a workstation experience in the cloud and so they are able to confidently relay this message to their end customers.

Why do your customers choose Blackbird's solutions over other cloud-based video platforms – what is your secret sauce?

The essence of our secret sauce is very much the Blackbird codec. It is lightweight – yet high quality. As a highly responsive codec, it enables us to provide that workstation experience in the cloud. Our rollout of Blackbird Ascent and Forte toolkits in JavaScript allows Blackbird to work on virtually any browser, at very low bandwidth. This is highly attractive as many more companies move to remote workflows and need the cloud to work with zero latency.

What's next for Blackbird – what will power your continued success?

Product development wise, we will be honing our JavaScript based editing solutions for Ascent and Forte

and also continuing to add features to the toolkits such as making various Blackbird APIs available for integration into the Blackbird platform. Time data exchange with AI cognitive engines, data providers and social media platforms is also a key initiative for us.

Commercially, we are focused on further raising the international profile of Blackbird so that media companies across all sectors can learn how this amazing technology can dramatically improve their video workflows, increasing productivity and reducing their costs significantly. We've signed contracts with numerous organizations over the past 12 months in the news, sports and eSports sectors across North America, Europe and Asia and have many more exciting opportunities in the pipeline that we're currently working on with some of the biggest names in the media industry. We are also keen to work more towards licensing the codec to OEM and solutions providers that have a broad user base.

It's a very exciting time as vast areas of the video world move towards cloud workflows and we are absolutely determined to ensure that Blackbird retains its position as the leading codec for viewing, editing and manipulating video in the cloud.

What IABM member services do you find most useful, and why?

My team finds IABM's resources such as training very useful as it enables them to keep up with trends in the industry. We also very much appreciate your presence and support at major shows such as NAB and IBC.

NEW IABM MEMBERS

B&M Video Tech
www.bmvtech.com

Airbeem
www.airbeem.com

Boxx TV Ltd
www.bbox.tv

Carrick-Skills
www.carrick-skills.com

DataZoom
www.datazoom.io

DIGIcas LLC
www.digicas.jp

DPG International
www.dpgplc.co.uk

Freesat UK Ltd
www.freesat.co.uk

GTT
www.gtt.net

Sound Devices, LLC
www.sounddevices.com

**Sports Information
Services Limited**
www.sis.tv

IABM UPDATE...

IABM EVENTS AT IBC

Friday 14 September

IABM Opening Keynote Executive Session

7.45am-8.45am. Breakfast from 7.30am (The Forum)

This thought provoking session will give an understanding of the dynamics and disrupters of the industry, together with vital objective business data and informed debate.



Friday 14 September

Unplug & Connect Networking Event

5.30pm-8.00pm. (IABM Member Lounge – Hall 4, Level 2)

Unplug and Connect is the premier networking event during IBC and is an ideal opportunity to network with colleagues, competitors, visitors and the wider Broadcast and Media Technology industry in a fun and relaxing environment with drinks and music where you can exchange views and ideas at the end of the first day of the show.

The event is the only after hours networking event at IBC2018 on Friday evening that will be attended by an international guest list from the broadcast industry. Attendance is by invitation only with around 400 guests made up of Directors, VP, CEO and Managers.

Saturday 15 September

BaM™ Awards 2018

6.00pm-8.00pm (The Forum)

We will be announcing the winners of our awards at a special reception.



Tuesday 18 September

Technology Advisory Board

7.30am-9.00am

(IABM Member Lounge – Hall 4, Level 2)

This event keeps members up to date with the latest technology related information from IABM and is a great opportunity to network among peers, discuss technology related outcomes from IBC and provide input for future IABM planning.



BAM™ AWARDS SHORTLIST

The shortlisted candidates have been designated by the 10 IABM BaMTM Awards categories, which reflect the entire breadth of the broadcast industry pipeline.



Connect

- Aspera
- BT Media & Broadcast
- LiveU
- V-Nova

Produce

- Aperi
- IBM
- Lawo
- Suitcase TV Ltd

Consume

- Broadpeak
- Hexaglobe
- NPAW (Nice People At Work)
- Screen Subtitling Systems

Project, collaboration or event

- Bitmovin
- NEP
- Telestream
- Verimatrix

Create

- BR Remote Ltd
- Datavideo Technologies Europe BV
- Rotolight
- SHOTOVER Systems

Publish

- Broadpeak
- Edgeware
- Harmonic
- Limelight Networks

Manage

- AWS Elemental
- Microsoft
- OOOYALA
- Piksel

Store

- Dell EMC
- EditShare
- Quantum Corporation
- Rohde & Schwarz GmbH & Co. KG

Monetize

- Brightcove
- Crystal
- Promethean.tv
- Verimatrix

Support

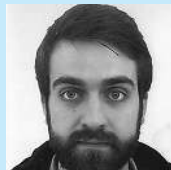
- Exponential-e
- Portrait Displays / SpectraCal
- TAG V.S.
- The Telos Alliance TV Solutions Group

Winners for each category will be announced at our awards ceremony at IBC on Saturday 15 September. All 10 winners will then be put forward for the prestigious Peter Wayne Golden BaM™ Award, with the final result announced at IABM's Annual International Business Conference in December 2018.

IABM Student Awards 2018

Students undertaking a technical education at degree level are often unaware of the amazing career opportunities that are available in the broadcast and media technology industry. Even where they see the chance, it can be difficult to make connections with the right people in the right companies.

Every year IABM makes awards of expenses paid visits for students to NAB in the USA and IBC in Amsterdam. The successful students get to see the amazing technology which is showcased at NAB and IBC and get to meet technical experts and prospective employers. Over five days they have the chance to investigate and advance their own career futures and gain the opportunity to brief fellow students on their return. Our students attending IBC are:



Baptiste Drapeaud
University of Valenciennes



Antonina Evdokimova
St. Petersburg University of Film and Television



Malory Forge
University of Valenciennes



Svetlana Nikitina
St. Petersburg University of Film and Television



Jared Pestugia
Southampton Solent University



David Schreck
Rhein Main University of Applied Sciences



Dominik Schulz
Rhein Main University of Applied Sciences



Nicholas Smith
Southampton Solent University

IABM training dates

Engaging with the Broadcast & Media Industry

Available on-line as an e-learning package

Introduction to Broadcast Technology

Available on-line as an e-learning package

IP and File Based Workflow

Available on-line as an e-learning package

Advanced IP Networks for Engineers

8-9 November London, UK

Audio & Video Fundamentals for Engineers

24-25 October London, UK
20-21 November Dubai, UAE

Broadcast Technology Workflows

22-23 October London, UK
22-23 November Dubai, UAE

High Dynamic Range & Wide Color Gamut

30 October London, UK

IP Network Essentials for Engineers

6-7 November London, UK

IP Overview for Technical Sales

5 November London, UK

Understanding File Formats

26 October London, UK

Where you can see us

We will be present at a number of shows over the next few months where members can take advantage of a variety of member benefits



17-18 October 2018 The Javits Center, New York

Inter BEE 2018

14-16 November 2018 Makuhari Messe, Tokyo



25-27 October 2018
Bombay
Exhibition Centre
Goregaon(e),
Mumbai



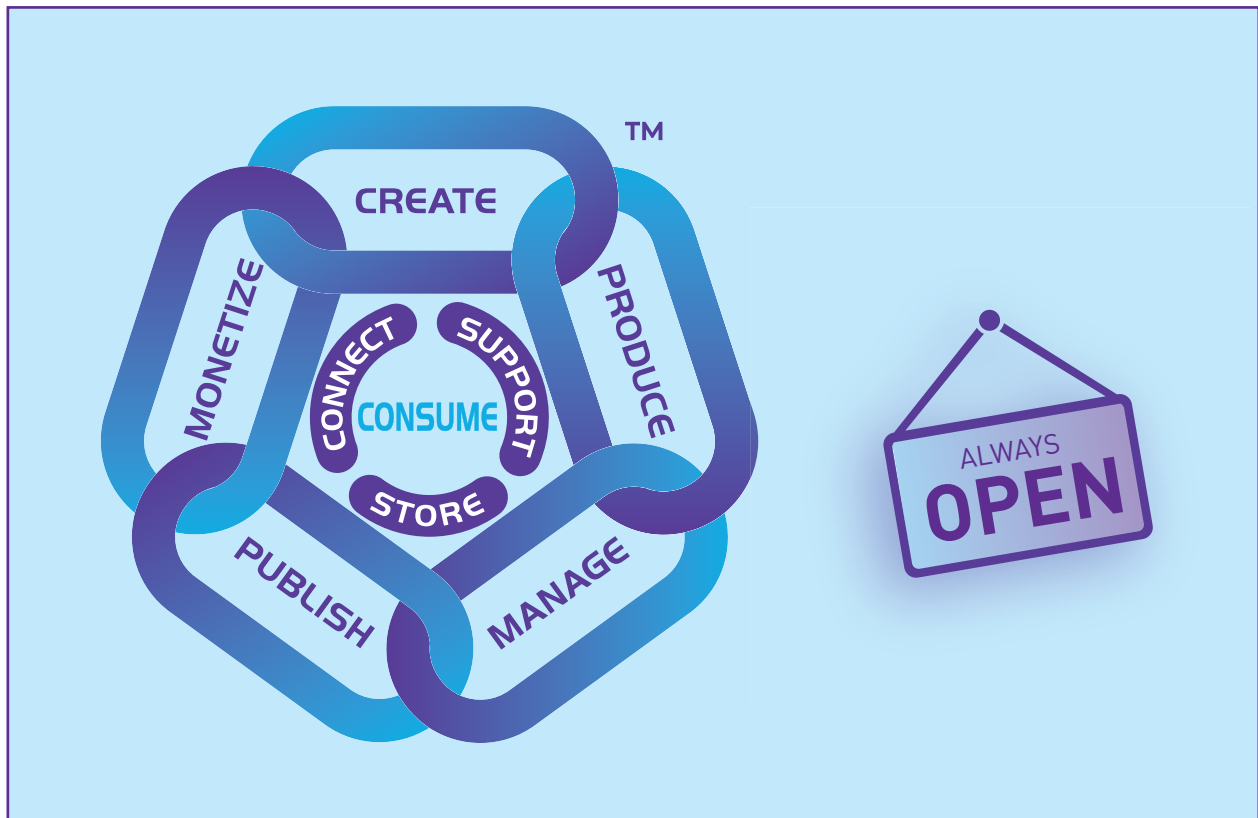
Who we are...

**EXHIBITION
FREIGHTING**

Exhibition Freighting is one of the UK's premier exhibition freight forwarders. We manage freight logistics to exhibitions in over 60 countries globally.

Our experienced and specialist teams will manage and co-ordinate your shipment smoothly and efficiently direct to your stand, whether by air, sea or road.

www.exhibitionfreighting.co.uk
+44 (0)1892 732009



IABM launches BaM™ Shop Window

– a new, one-stop portal for technology buyers

The BaM™ Shop Window aims to bring all of the products and services available across the industry together into a single portal to enable all solutions and alternatives to be quickly discovered by technology buyers.

1000s of products and services

The BaM™ Shop Window is built on IABM's BaM™ Content Chain model – describing the industry in the same way that broadcast and media companies themselves think. It maps all the activities that make up the content supply chain – how a piece of content gets from creator to consumer.

Easy to use

The BaM™ Shop Window is uniquely buyer-friendly, enabling relevant products and services to be quickly found and compared.

Everything you need

Every product/service listing includes not only product name and area of application, but also gives vendors the opportunity to provide specifications, technical details, diagrams and images, as well as a link back to the vendor's website for more in-depth information.



Visit the BaM™ Shop Window now at:
www.theiabm.org/iabm-bam-content-chain-homepage/