

BROADCAST - FILM - POST - INFOTAINMENT TECHNOLOGY

# **B** BROADCAST & FILM

GLOBAL MEDIA FOR BROADCAST,  
FILM, POST & INFOTAINMENT  
TECHNOLOGY & BUSINESS

JANUARY - FEBRUARY 2022

E-EDITION

NÜRNBERG MESSE

THE YEAR AHEAD

# 2022



**2021**  
**Media Kit**

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**Broadcast, Film, Post & Infotainment Technology Markets in India**



Broadcast & Film – [www.broadcastandfilm.com](http://www.broadcastandfilm.com) – is a leading online publication serving the broadcast, film, post and infotainment technology markets globally. From being published since 1991, to its shift to the online platform in 2013, the magazine has established itself as a credible source for industry news, analysis and technology trends in the broadcast and entertainment technology industry. We cover the emerging new technologies and trends, including the transition to the digital phase of the ever-evolving media and entertainment sector.

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## Bi-Monthly Digital Edition of Broadcast&Film Magazine

- ❖ Full page Color Ad – \$ 250 – 1 insertion (Size: W 200mm x H 265mm)



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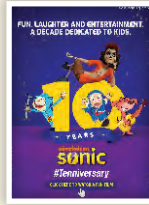
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**MANOJ MADHAVAN**  
*Editor*

**Television would account for 40% of the Indian media market in 2024, followed by print media (13%), digital advertising (12%), cinema (9%), and the OTT and gaming industries (8%). The market is projected to increase at a CAGR of 17% between 2020 and 2023.**

**Within the M & E sector, the Animation, Visual Effects, Gaming and Comic (AVGC) sector is growing at ~29%, while the audio-visual industry and services are rising at the rate of ~25%. The AVGC sector is estimated to grow at ~9% to reach ~Rs. 3 lakh crore (US\$ 43.93 billion) by 2024.**

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### From the Editor's Desk

2022, the new year has opened with the scare of Omicron spreading rapidly. The impact has been tremendous across the globe and in India with some major movies postponing their theatrical releases. The mega blockbuster movie- RRR by SS Rajamouli made at an astounding budget of US\$ 53 million (INR 400 crores) was to release in theatres across India & globally in January 2022. Now the release has been postponed indefinitely due to the Omicron scare.

Major movies opting for an OTT release has spurred the growth of OTT subscribers across the board in India. OTT sector has seen an increase of 30% in paid subscribers. The number of paid users increased from 22.2 million to 29.0 million (March and July 2020). The Top five metro cities account for 46% of India's total OTT video platform subscribers. Regional content on OTT platforms attracts 90% of consumers, while only 07 % watches English content. ZEE5 achieved a viewership of 437.4 million (March 2020 to April 2021). Disney Hotstar and Netflix together account for 78% of India's total online video subscription market.

The Indian OTT market expects to reach a target of Rs 237.86 billion (US\$3.22 billion) by FY25. The film entertainment market's overall revenue exceeded 70 billion Indian rupees in 2020. Disney+ Hotstar, Netflix, Amazon Prime Video, and YouTube prove significant contributors to streaming content.

According to the FICCI-EY report the media and entertainment business is estimated to grow 25% to reach Rs. 1.73 trillion (US\$ 23.29 billion) in 2021. Further, it is projected to grow to Rs. 2.23 trillion (~US\$ 30.6 billion) by 2023

Television would account for 40% of the Indian media market in 2024, followed by print media (13%), digital advertising (12%), cinema (9%), and the OTT and gaming industries (8%). The market is projected to increase at a CAGR of 17% between 2020 and 2023.

In FY20, digital and online revenue stood at Rs. 26 billion in the M&E sector. Their contribution to the industry increased to 23% in 2020 from 16% in 2019. This is likely to go up further.

Within the M & E sector, the Animation, Visual Effects, Gaming and Comic (AVGC) sector is growing at ~29%, while the audio-visual industry and services are rising at the rate of ~25%. It is recognised as one of the champion sectors by the Government of India. The AVGC sector is estimated to grow at ~9% to reach ~Rs. 3 lakh crore (US\$ 43.93 billion) by 2024.

PWC forecasts that India's Entertainment & Media industry will reach INR 412656 Cr by 2025 at 10.75% CAGR. It expects T.V. advertising to rise from Rs. 35015 crores in 2020 to Rs. 50,660 crores in 2025.

So interesting and flattering projections by one and all. And we all can hope all of this falls in place and the entertainment sector is set for the surge in 2022 -2023.

Wishing all the readers a very happy and prosperous New Year.

**Manoj Madhavan - Editor**

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## JOE ZOOK BUILDS DOLBY ATMOS STUDIO WITH KRK PRO AUDIO

*World-class Engineer Relies on KRK Monitors*



Having spent his entire childhood and teenage years playing guitar for a variety of bands, Joe Zook would soon discover his true passion—music production. After attending recording classes and landing an internship at a local studio, Zook mixed everything from worldbeat and jazz records to ESPN fishing shows and political ads. Today, as a world-class mixing engineer, Zook has worked with artists such as Alessia Cara, AJR, OneRepublic, Modest Mouse, Katy Perry, Smokey Robinson, and hundreds more. When Zook recently decided to upgrade his studio for Dolby Atmos recording, he turned to KRK V-Series studio monitors (V4 and V6), as well as the brand's S12.4 subwoofers.

For the past few years, Zook had been deploying KRK's V4s as an auxiliary pair of mixing monitors. Knowing and trusting the KRK sound, Zook was confident the brand would be the best fit for his new Dolby Atmos studio. In his 7.1.4 Atmos system, Zook has V6s surrounding him, V4s mounted on the ceiling, and two S12.4 subwoofers under his desk. "I've gotten very familiar with the KRK sound and really like the audio consistency across the entire V-Series line," he says. "I simply trust that a good mix will feel right on the KRK V-Series."

For Zook, a key advantage of the KRK V-Series is that they aren't overly sensitive to placement in his room.

## LIVEU EXPANDS ITS LIVE PRODUCTION PLATFORM WITH THE LAUNCH OF AIR CONTROL, A CLOUD SOLUTION FOR LIVE PRODUCTION WORKFLOW ORCHESTRATION

**Elevating the live production workflow and effortlessly delivering flawless live programs of any size using existing teams and technology infrastructure**

LiveU, the leader in live video streaming and remote production solutions, announced the launch of Air Control, a groundbreaking broadcast orchestration cloud solution.

Built for broadcasters as a human-centric offering, Air Control enables organizations

to better choreograph live production workflows, and effortlessly deliver high-quality flawless live programs of any size while providing the commercial and operational flexibility much-needed to support the rapidly changing industry.

An integral part of LiveU's live video ecosystem, Air Control revolutionizes and simplifies the ability to provide a well-integrated, seamless, and intuitive live video production. The collaborative solution eliminates the need to settle for not-fit-for-purpose technologies, fragmented workflows, and inflexible operational models to accommodate evolving production needs while ensuring the highest quality and reliability. Broadcasters are assured to be at the cutting edge of technology, while continuing to rely on LiveU's renowned customer service – allowing them to focus on what they do best.

"Air Control's disruptive concept is poised to transform the control room, unlocking the potential of the broadcast industry once again as LiveU did 15 years ago. Air Control streamlines and simplifies the production workflow by connecting everyone involved in the production including engineers, editorial, anchors, reporters, announcers, and guests using a single platform," said Ronen Artman, VP Marketing at LiveU. "Air Control removes risk and complexity by replacing general-purpose, consumer-based video conferencing solutions with a robust broadcast-grade orchestration and transmission tool, leveraging LiveU assets and giving production crews a complete solution to manage all of the human elements of a live remote production."

Air Control was designed from the ground up for the broadcast industry, providing a cost-effective solution to address production budgets, challenges, and overall needs. As part of LiveU's cloud platform, Air Control removes the need for additional computers, servers, or hardware as well as the need to use consumer software in the broadcast workflow. Instead, teams can simply work with the devices, laptops, phones, and tablets they use daily, while benefiting from a professional service.





## **WATCH BRAZIL EXPANDS REACH WITH KALTURA POWERING ITS NEXT-GEN STREAMING TV SERVICE, HOSTED ON AWS**

Kaltura, the video experience cloud, announces that internet services and technology provider Watch Brazil launched its next-generation streaming TV service, Watch, powered by Kaltura and hosted on Amazon Web Services (AWS). Demonstrating the appeal of the new service, in its first six months of operation, Watch's user base has grown by over 25%.

Watch went live in Spring 2021 with 90 linear channels delivered by Kaltura on AWS transmitting the service's wide array of engaging content. Watch offers premium international and national sports, general entertainment, TV series, comedy, drama, and news for subscribers to enjoy on the web, Android and iOS mobile devices and connected TVs.

Watch Brazil is among the first internet providers in the country to take advantage of a new licensing regime, established in 2020, which opened up the digital entertainment market to internet service providers.

"We are extremely excited that Kaltura is our technology partner as we embark onto the dynamic Brazilian entertainment marketplace," commented Maurício Almeida, Founding Partner at Watch Brazil. "We are confident that with Kaltura's high-quality video channels, flexibility and scalability, we're delivering a world-class streaming TV service which will continue to grow in popularity."

"We are very proud that our technology is helping Watch Brazil to deliver this exciting new TV offering," said Anil Hinduja, Global Head of Edge Compute, Content Delivery Network, Elemental Media & Security at AWS.

"Broadcasters are looking for simplification, flexibility and innovative tools to accommodate today's changing media landscape. What they are not willing to compromise on is quality, reliability, and a superb customer experience. With Air Control, we are taking this to the next level and revolutionizing the live production orchestration space," added Artman.

## **FLUID PICTURES SUPPLIES DISCREET RAIL DOLLIES TO LA'S TV SHOWS - FOR SONY VENICE CAMERAS WITH RIALTO EXTENSION SYSTEMS**



When TV shows want moving but discreet cinema cameras, Los Angeles based Fluid Pictures supplies rail systems with compact stabilized heads, perfect for Sony Venice cameras with Rialto extension systems.

In recent years, cinema cameras are becoming increasingly popular for live broadcast and live on tape productions of concerts and other entertainment shows. Fluid Pictures supplies moving camera platforms to many high-profile entertainment events around Los Angeles and its founder David Eastwood says around half of his assignments now involve cine style setups.

"At big shows with a high number of cameras, the productions still mainly use broadcast cameras, like the Sony HDC-P50 4K. However, most concerts, comedy specials and the streaming platforms like Netflix and Amazon prefer cine style productions nowadays. With the modern compact cine cameras, we can still move them on small rigs but of course the cinema lenses have a very limited zoom range in comparison to 14x or 22x zoom broadcast lenses" says David Eastwood.

When a TV production requests discreet rail systems with cinema cameras, David often recommends Sony Venice with the Rialto extension system. This allows for only having the camera sensor and lens up on his compact NEWTON stabilized remote heads, while he can hide the rest of the camera body down on the rail dolly. This setup was for example recently used at Disneyland, for the Disney Magical Holiday Celebration, which was broadcast in USA November 28 on ABC. Fluid Pictures supplied a rail system with telescopic tower, that moved in front of a live on tape stage performance with Gwen Stefani among others.

On November 27 and 28, Fluid Pictures was also hired to supply rail systems to LA's SoFi Stadium, where the Korean pop group BTS held sold out concerts to 70 000 attendees. Fluid Pictures brought 4 rail systems; 1 Ross Furio dolly and 3 of the recently launched Rhythm Track by Defy Products. All four featured telescopic towers with NEWTON stabilized heads, controlling Sony Venice cameras with Rialto extension systems and Fujinon Cabrio 19-90 lenses.

## ASTRO SELECTS KALTURA TO POWER ITS STANDALONE STREAMING SERVICE OFFERING



Kaltura, the video experience cloud, announced that Astro, Malaysia's leading content and entertainment company, chose the Kaltura TV Platform to power sooka, its standalone streaming service offering targeted at digital and mobile-first millennials. sooka went live in June across Malaysia.

Astro chose Kaltura as its technology partner due to its multiple worldwide reference cloud TV deployments to deliver linear channels, live events and on-demand viewing experiences on web and iOS and Android mobile devices. Also allowed Astro to incorporate multiple business models and payment methods such as Google In-App Billing, and Apple In-App Purchase, with Direct Carrier Billing soon to follow.

It delivered the solution for sooka in under six months, enabling the service to be live in time to stream UEFA EURO 2020. This resulted in a high-impact debut for sooka, which ranked the number one entertainment app on Google Play within two weeks of launch.

sooka offers its viewers a freemium package with a selection of ad-based content that can be expanded into broader content bundles based on multiple subscription plans. It delivers live sports events like the Premier League, Euro 2020, Olympics 2020, BWF badminton, NBA, and Formula 1 as well as over 4000 hours of Malaysia's favorite Malay and Asian dramas, movies, and variety shows.

David Eastwood elaborates: "When the production wants cine gear, we also suggest other compact cameras like Arri Alexa Mini and Canon's Cine-Servo lenses that we can control with the NEWTON control panel just like broadcast lenses. Sometimes we get Fujinon Premista lenses that we need to put external motors on and the RTmotion lens system also integrates well. We have used the NEWTON stabilized heads on Ross Furio dollies for years, but this year we have also started using them on Defy's Rhythm Track dollies, and we had for example 3 of them at the Alter Ego show on Fox. The telescopic tower on the Rhythm Track has 1 foot more range than the Furio and it also has a slimmer profile, so it can move inside narrower gaps in for example a stage. Defy's Rhythm Track can also travel 30 mph if you would ever need it but a feature we have used more is the "Boomerang", that the dolly can travel back and forth autonomously. We control all our dollies with foot pedals but sometimes it's nice to only concentrate on the camera and lens. For the Sony Venice camera with Rialto extension system, we have custom built a little platform on the dollies, so we only have the camera sensor up on the NEWTON stabilized head and this makes a very discreet camera package. The only negative is that we lose the endless pan because of the Rialto extension cable, but on the rail dollies we usually don't need that anyway. For example at the Oscars this year where we had a cable cam over the outdoor patio, we used the unlimited pan with a Sony P50 camera instead."

## AMERICAN SOCIETY OF CINEMATOGRAPHERS TO RELEASE STEM2

**Standard Evaluation Material Designed to Test New Technology Implications on Imaging Chain Offered as Free Download to Industry**



The American Society of Cinematographers (ASC) announces the release of its Standard Evaluation Material II (StEM2) project. The short film is an initiative by the organization to provide standardized viewing material designed to aid in the development and calibration of technology impacting the modern imaging chain. StEM2 test packages will be available in early 2022 to download for free in all common theatrical and home TV formats.

"The Mission," a professionally produced short film for the StEM2 initiative, emulates a high-end movie. Under the direction of the ASC, the film was designed to test exhibition and streaming systems, displays, and image-processing tools used in production and post.

"We set out to create a comprehensive assessment of the elements that increasingly impact professional production in today's environment," says ASC President Stephen Lighthill. "StEM2 offers the industry the information needed to support developments and advancements of products and solutions for image creation. Everyone from filmmakers, studios and post houses to engineers, technologists and manufacturers are affected by the technical complexities impacting storytelling."

StEM2 was produced with significant backing from studios, technology companies and industry leaders, including a seed grant from Epic MegaGrants, as well as major support the Academy of Motion Picture Arts and Sciences (AMPAS) Scientific and Technical Council.



## CHRISTMAS DOWN UNDER SHOT USING BLACKMAGIC DESIGN CAMERAS AND POSTED WITH DAVINCI RESOLVE STUDIO

Blackmagic Design announced the Ion Network's new Christmas film, *Christmas Down Under*, was shot using Blackmagic Design's URSA Mini Pro 4.6K G2. The film's editing and color correction was completed using DaVinci Resolve Studio by Tasmania's South Sky pictures during the height of the Covid quarantine.

The film, which is being distributed by Ion Network's in the United States and by Level 33 globally, was directed by My Big Fat Greek Wedding's Louis Mandylor and produced by Adam Horner of Ignite Pictures. It follows a tightly wound American, Ellie, who flies to Australia and enlists the help of an aboriginal tour guide and YouTube famous Uber driver to find her husband and his eclectic family.

*Christmas Down Under*, a full length feature, was shot in 20 locations in Australia over three weeks and required incredibly efficient filmmaking. Also, because the film is being shown in a crowded market of

holiday films, speed and efficiency had to come with high quality.

"The holiday film industry is incredibly competitive, and more so now than ever. We're now seeing almost every major network producing numerous holiday movies per year. So, quality matters and that was the reason we chose to use the URSA Mini Pro 4.6K G2 and DaVinci Resolve," said lead producer Adam Horner.



## BLACKMAGIC DESIGN ANNOUNCES BLACKMAGIC CAMERA 7.7 UPDATE

Refines imaging performance for Blackmagic URSA Mini Pro 12K improving color balance and shadow detail



Blackmagic Design announced Blackmagic Camera 7.7 update which further enhances sensor performance for Blackmagic URSA Mini Pro 12K. This update refines the sensor's unique technology with fine adjustments to the demosaic algorithm, leading to a more neutral color balance and enhanced sharpness of shadow details for better overall image quality.

Blackmagic Camera 7.7 update is now available as a free download from the Blackmagic Design website.

Blackmagic Camera 7.7 update for URSA Mini Pro 12K optimizes the 12K sensor by further improving the clarity of fine detail in shadow regions. It also provides a more neutral color balance with a more accurate starting point for better skin tones, while still retaining the natural soft highlight rolloff

of film which customers enjoy from URSA Mini Pro 12K. In addition, the incidence of moire has been reduced when capturing ultra high resolution scenes with very high frequency fabrics or architectural textures.

"The images have that creamy but detailed film look that is so pleasant and also reach well into the highlights and shadows. There are no artifacts which is really important for my work," said Christian Sebaldt, ASC, in testing a beta of the update. "And skin tones always look natural and, to me, these are features of a \$40,000 camera."

Cinematographer Vance Burberry extensively beta tested the new update on live productions. "After shooting three projects with the LA Philharmonic at the Hollywood Bowl, the new update makes the image cleaner in the shadows,"

## DVB GETS ON 8K



8K is all set to kickstart as the DVB Steering Board has approved the first specification updates to include the delivery of 8K UHD video services.

The updates extend the existing support for the HEVC codec and are the first step in a series of key additions planned for the DVB video coding specifications.

HEVC (High Efficiency Video Coding), also known as H.265, is a standard that offers from 25% to 50% better data compression at the same level of video quality compared to its predecessor MPEG-4/AVC. It is already used in several markets around the world.

Until this update, DVB specifications included HEVC conformance points only for up to 4K resolution.

Work is continuing on so-called Next Generation Video Coding, which is expected to lead to further additions to the DVB specifications in 2022.



said Burberry. “Usually, I’d never try to pull up the shadows, but when I did, there was less noise and at normal exposure, the shadows stayed very clean. There is something special about the URSA Mini Pro 12K’s sensor. It has this incredible resolution but at the same time, has a delicateness to it that really reminds me of film.”

Blackmagic URSA Mini Pro 12K is a revolution

in digital film with a 12,288 x 6480 12K Super 35 sensor and 14 stops of dynamic range, built into the award winning URSA Mini body. The combination of 80 megapixels per frame, new color science and the flexibility of Blackmagic RAW makes working with 12K a reality. Oversampling from 12K gives you the best 8K and 4K images with the subtle skin tones and extraordinary detail of high end still cameras. You can shoot at 60 fps in 12K, 120 fps in 8K and up to 240 fps in 4K Super 16. URSA Mini Pro 12K features an interchangeable PL mount, as well as built in ND filters, dual CFast and UHS-II SD card recorders, a SuperSpeed USB-C expansion port and more. DaVinci Resolve Studio is included for creative control through post from editing to color, VFX and more!

URSA Mini Pro 12K’s extreme resolution goes well beyond traditional motion picture film. Customers get the benefits of shooting with film including incredible detail, wide dynamic range and rich, deep color. This means it’s perfect for feature films, episodic television and immersive, large format IMAX. The incredible definition around objects makes it ideal for working with green screen and VFX including compositing live action and CGI.

“Cinematographers love the incredible look of the 12K sensor and generation 5 color science of the Blackmagic URSA Mini Pro 12K,” said Grant Petty, Blackmagic Design CEO. “The new Blackmagic Camera 7.7 software update gets even more out of the incredible sensor without losing that special look that our customers love. We’re excited to be making this great camera even better whether our customers are using it on high end feature films, music videos, indie projects or even VFX work!” ■



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# CINEMATOGRAPHY TRENDS WITH CANON CINEMA EOS SERIES

*Diving into the new trends in Cinematography with Canon Cinema EOS Ambassadors*

*Canon Cinema EOS Series has been well accepted across the board. Whether its wildlife, documentary, cinema and wedding shoots. Leading Canon Cinema EOS ambassadors share their insights on the current cinematography trends and experience of shooting with Canon Cinema EOS Series.*

## VIJAY BEDI and AJAY BEDI - Wildlife Filmmakers

*The Bedi brothers are wildlife filmmakers and photographers coming from a family that has a long history of expertise in this highly specialized field. Vijay Bedi & his twin brother Ajay Bedi are the youngest Asians to have won the Green Oscar for their films – The Policing Langur. Ajay Bedi & Vijay Bedi are also the only Indians to have won a nomination at the television highest awards at Emmy® Academy of Television Arts & Sciences. Vijay & Ajay, father Mr Naresh Bedi is also world renowned wildlife conservationist. He is the first Asian to receive a Wildscreen Panda Award and the first Indian to receive a nomination for the British Academy Film Awards. He was honoured by the Government of India in 2015 with Padma Shri, the fourth highest Indian civilian award.*



**BEDI Brothers**

### Which wildlife cinematographers, past or present, do you most admire? How challenging is it to shoot wildlife?

I really like young Bertie Gregory cinematography. Bertie has filmed television shows for Nat Geo WILD (Mumbai's urban leopards and caiman hunting jaguars), as well as for BBC's Planet Earth. He also filmed for BBC David Attenborough series "Seven worlds, One planet and won BAFTA and Wild life: resurrection Island and Wild Life: The Big Freeze for Nat Geo series.

Filming nature documentaries comes with lots of challenges. That really need depends hugely on the subject matter: filming small creatures requires macro lenses and perhaps even more specialized probe lenses; filming distant subjects requires long lenses; filming light-sensitive animals at night needs infra-red lighting and IR sensitive cameras or starlight cameras;

filming in Ladakh(cold desert) wildlife requires cold adapted equipment. And most of the time you are filming in extreme weather conditions beyond your control.

### Your take on the latest trends in cinematography in 2021?

2021 seemed like a camera war, every company was taking a camera out with the best features. Canon seems to have held its ground and got a



major shift to 8k while the rest of the industry was still coping with 4k workflow. In 2022 I think there will be a big shift and focus on 8k cameras which could be a future trend after the Olympics were filmed in 8k. This works very well for us in terms of natural history film that we can future proof our content for

8k workflow and for future productions. That way we are working at par with the Indian feature film industry as far as quality is concerned.

### **How do you find shooting with Canon EOS Cinema Series? Which Canon camera are you using presently?**

We use different Canon EOS cinema cameras for different productions. If we have more time to control for factors and set up, we prefer the Canon EOS C700 FF which produces very crisp video quality. It is slightly bigger than other cinema cameras but holds its ground when it comes to quality. We also like to work with the EOS C70 Cinema camera a lot which looks like any mirror less camera but has professional audio ports to plug in our microphones to give us broadcast quality.

## **PRIYA THUVASSERY**

### **– Documentary Filmmaker**

*An independent documentary filmmaker and television producer based in New Delhi, Priya's body of work has focused on women and gender, her stories windows into myriad experiences of the body, the environment, the community, mapped from gender and feminist perspective. Priya has been directing, producing and editing documentary films & television programmes for New Delhi Television, Fox Traveller, CNA, National Human Rights Commission of India, Films Division of India, Public Service Broadcasting Trust & Khabar Lahariya for over a decade now. She has been Co-Director of the IAWRT Asian Women's Film Festival, New Delhi, from 2019-2020 and is currently a board member for IAWRT India chapter 2020-2022. She is also recognized as a Canon Cinema EOS Platinum Associate. Currently, she is working on a series of climate change films and the impact of Coral Woman film. Priya has a Master's in Mass Communication from the Anwar Jamal Kidwai Mass Communication Research Centre, at Jamia Millia Islamia University, New Delhi.*

### **What motivated you to shoot documentaries? And how challenging is it to shoot documentaries?**

I love hearing stories, meeting new people, travel and having extraordinary lived experiences. The first motivation is to live or experience it myself and then



share, convert that lived experience into an audio and video story. So, documentary films happen to me as a by-product of my urge to live these realities breaking one's comfort zone. So, most of the time these films/ themes push you to extremes- from going to a desert to underwater. These journeys often lead to a lot of physical and technical challenges. But the most difficult ones are when you have to deal with the emotions, trust,



confidentiality, safety of your characters. You are dealing with real lives and people in your film. They have a reality beyond your film. And at the same time as a filmmaker, there is a responsibility to tell a story. The lines you draw between these two leaves space for a lot of challenges and responsibilities.

### Your take on the latest trends in cinematography in 2021?

In 2021, I assume it's also due to the pandemic impact, a lot of documentary filmmakers are turning to cinematographers and is doing multitasking, working in smaller crews etc. So, they are going for user-friendly camera's that enable them to multitask.

### How do you find shooting with Canon EOS Cinema Series? Which camera are you using currently?

Cinematic - that is my one word



for the experience. It performs so well even in low light conditions! These days documentary filmmakers are looking for broadcasting, OTT and

theatrical releases. So, the quality that the Canon EOS Cinema series provides is amazing. Currently, I am using the Canon EOS R6 and Canon XC15.



## ALPHONSE ROY

### – Wildlife Filmmaker & Bollywood Cinematographer

*Wildlife cinematographer Alphonse Roy has been wandering in the wilderness for over two decades, befriending tuskers and taking shots of big cats. While he has worked on a number of wildlife documentaries such as Treasure Seekers: Tibet's Hidden Kingdom, Man-Eaters of India, Kingdom of Cobra, Temple Tiger, Elephant Mountain, and Tiger by Night among many, he stumbled upon mainstream commercial movies, making his feature film debut with the award-winning movie Aamir in 2008. Mr. Roy is known for projects like Mai Ghat, Gulaab Gang, Raid, Aamir and Mumbai Cutting.*

### Which are the cinematographers you admire and were you influenced by anyone? Which films in Bollywood and Hollywood stand out for their cinematography?

The cinematographer I admire in the UK is Roger Deakins, and my favourite film of his is The Assassination of Jesse James. In India, my favourite cinematographer is Santosh Sivan ASC. A memorable work of his is the Chaiya Chaiya Song. Just imagine what he would have done if

he had today's small Camera body from Canon, and I am talking about the form factor of Canon EOS professional cameras.

### Your take on the latest trends in cinematography in 2021?

There are multiple trends that



have come cinematography's way in the recent past. Cameras are moving a lot and have now become a part of the storytelling. Earlier cameras were more just observers from a director's point of view but now because of the development of technology and compact camera sizes, they have seamlessly become a part of the whole.

Secondly, multi-camera shooting has become the norm now. On one set there is no longer just one main camera, whereas there are multiple cameras to capture different actors and shots at various angles. Earlier we would have to sacrifice video quality for the sake of putting the camera at the edge of a bike or for other such risky shots, but now innovation has enabled smaller camera bodies with higher quality, which has brought a big change in Cinematography. The democratising of filmmaking by digital technology has been another game

changer. There is freedom of expression even for the common man who may not know all the nuances about the art of filmmaking but can still explore the same with the help of technology.

Lastly, the development of Artificial Intelligence has played a large role as well. IRIS was earlier used only by eye doctors, but this has now shifted to cameras in the form of autofocus technology. Motion pictures are now using advanced autofocus for not just humans but even animals, making filmmaking and capturing such shoots more scientific and objective. Now an image is never out of focus!

### **How do you find shooting with Canon EOS Cinema Series?**

I love the Canon C700 camera with Canon lenses. My film, which won an award for Best Cinematography at the Singapore International film festival, was shot on Canon C700. The

noiseless low light sensitivity and accurate colour rendition by that sensor are valuable to me. The personal camera I am using now is the Canon R6. It is a recent acquisition and I have fallen in love with it. I had the opportunity to shoot the Taj Mahal on the 18th of November, which also happened to be the full moon night. But unfortunately, it turned out to be a cloudy night with the moon well hidden behind the clouds. In Taj Mahal you can use a tripod as the Archaeological Survey of India has an Archaic rule which says professional shooting needs special clearance from ASI. By definition in ASI parlance, "Professional Shooting happens with a tripod". But with R6 I shot this image at 1/30th of a second with 35mm f1.4 Lens at an ASA of some 12000. But the beauty is even in such low light the colours are so true. This sensor has "Rods And Cones" like a Tiger.





## RAJESH GUPTA

### – Wedding Filmmaker

*Rajesh Gupta, also known as The Lensocrat is an artiste by default. He is a multidisciplinary and award-winning celebrity photographer. His recent work includes the prestigious portrait shoot of the Oscar winner lyricist Gulzar, Mr Shah Rukh Khan, Pandit Chitresh Das, Amrish Puri, Mithun Chakraborty, Pandit Birju Maharaj, Pandit Jasraj, Mahendra Singh Dhoni etc. He has also worked in collaboration with Master painters, Paresh Maity, Wasim Kapur, Sanatan Dhinda, Chittrovanu Mazumdar and G R Iranna. Designer Raj Mahtani, Kiran Uttam Ghosh, Anamika Khanna, Manish Malhotra, Shyamlu Dudeja and many more.*

### What motivated you to shoot weddings? And how challenging is it to shoot weddings?

Wedding Photography happened to me! Yes, it was arranged. I started primarily as a street photographer and used to love capturing candid Portraits of people. Gradually I became a family Portrait photographer specializing in coffee table books. So, one day I got a call from one of the renowned Industrialist family from Kolkata asking if I can come to their party during an engagement ceremony and take a few portraits of the couple. I took three days to reply. I was in two minds about taking up the assignment. I wanted to say NO but the family kept insisting I quoted a premium so that they can say no, but the family agreed to it. The picture of the couple became very popular amongst their friends and family and thus started my journey into the genre of wedding and events photography.

### Your take on the latest trends in cinematography in 2021?

Reels are trending now a days. We have started thinking in Portrait mode. From 16:9 to 9:16 ratio. It's a reverse ratio and its challenging to



shoot. The transitions and cuts have become faster so we have to do a lot of thinking before the shoot and after the shoot on the edit table.

### How do you find shooting with Canon EOS Cinema Series? Which camera are you currently using?

I cannot think beyond

Cannon cameras now a days. They are the most versatile, user friendly and advanced system I have come across, I shoot in C LOG and the colour palate and skin tone is simply brilliant. The menu is simple and to the point. My Camera bag contains three cameras – Canon EOS-1D X Mark III, Canon C200 and the Canon EOS R5 along with R lenses. ■

# TIME TO RAISE A TOAST TO THE INDIAN M&E INDUSTRY

*A column on significant developments in the media world*

*By Ashok Mansukhani*

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Specialist in Multi Media Law and Regulation/Corporate Law  
and Regulation and Taxation.*



*2021 in retrospect-looking forward to a vibrant 2022*

## A. MEDIA SCENARIO FORECASTS AND TRENDS

1. **2021** was a year of recovery for Indian media. As the pain of the second wave of Covid dulled, media began to normalise with viewers returning to Television especially live sports but retained their abiding interest in edgy and fresh streaming content. The recent **Omicron** scare will only increase work from home. It will not be a significant drawback for the Indian media industry.
2. The **Indian Brand Equity Foundation**-a Government-sponsored Trust, regularly shares valuable updates on key developments in Indian media. It's **December 2021** update has relied mainly on the **FICCI/EY FICCI Frames** report of early **2021** to state that Indian Media and Entertainment is on the "cusp of a strong phase of

growth, backed by rising consumer demand and improving advertising revenue."

3. According to the **FICCI-EY** report, the Advertising to GDP ratio is expected to reach **0.4%** by **2025** from **0.38%** in **2019**. It



forecasts that as per the **FICCI-EY** report **2021**, the media and entertainment business is estimated to grow **25%** to reach **Rs. 1.73 trillion (US\$ 23.29 billion)** in **2021**. Further, it is projected to grow to **Rs. 2.23 trillion (~US\$ 30.6 billion)** by **2023** due to the acceleration of

digital adoption among users across geographies.

4. Television would account for **40%** of the Indian media market in 2024, followed by print media (**13%**), digital advertising (**12%**), cinema (**9%**), and the OTT and gaming industries (**8%**). The market is projected to increase at a CAGR of **17%** between **2020** and **2023**.
5. In **FY20**, digital and online revenue stood at **Rs. 26 billion** in the M&E sector. Their contribution to the industry increased to **23%** in **2020** from **16%** in **2019**. This is likely to go up further.
6. Within the M & M&E sector, the Animation, Visual Effects, Gaming and Comic (AVGC) sector is growing at **~29%**, while the audio-visual industry and services are rising at the rate of **~25%**. It is recognised



as one of the *champion sectors* by the Government of India. The **AVGC** sector is estimated to grow at ~9% to reach ~**Rs. 3 lakh crore (US\$ 43.93 billion)** by **2024**.

7. Advertising revenue in India is projected to reach **Rs. 915 billion (US\$ 12.98 billion)** in **2023**, from **Rs. 596 billion (US\$ 8.46 billion)** in **2020**. India's subscription revenue is projected to reach **Rs. 940 billion (US\$ 13.34 billion)** in **2023**, from **Rs. 631 billion (US\$ 8.95 billion)** in **2020**.
8. **IBEF** forecasts that Television will account for **40%** of the Indian media market in **2024**, followed by print media (**13%**), digital advertising (**12%**),

cinema (**9%**), and the OTT and gaming industries (**8%**).

9. Global Trends as per **PWC Global Outlook for 2021-2025** show global growth in **E & M** expenditures averaging at **04.6%**, with India topping the figures at **09.9%**. Interestingly enough, **PWC** forecasts an increasing trend towards the growth of adoption of Virtual Reality globally at **30.60 %**, followed by cinema at **16.6 %** and OTT streaming content at **09.40%**. T.V. advertising would grow only at **3.15%**, and *traditional T.V. and home video would see a de-growth of 1.00%*.
10. **PWC** forecasts that India's Entertainment & Media industry will reach **INR 412656 Cr** by

**2025** at **10.75% CAGR**. It expects T.V. advertising to rise from **Rs. 35015 crores** in **2020** to **Rs. 50,660 crores** in **2025**.

11. As per **Statista Research**, the total number of Pay-TV subscribers is **164.1 million**.
12. **Media Partner Asia**, in its latest **APOS Report** released in **November 2021**, has stated that India's total video market - traditional T.V. and digital - is currently at **\$11.6 billion** and will grow at a **9.5% CAGR** in the next five years to touch **\$18 billion** in revenue by **2026**, "*A buoyant economy will drive ad revenues both for Television and online video. However, subscription revenue growth will primarily come from online video.*"

## B. SIZE OF THE INDIAN ELECTRONIC M & E INDUSTRY

1. In its latest consultation paper issued on **25.10.2021** on *Market Structure/Competition in Cable T.V. services.*", the **Telecom Regulatory Authority of India** has stated that Television is one of the most prominent mediums in India for the transmission of information news, entertainment, etc.
2. The television broadcasting and distribution services in India mainly comprise Cable Television Services (Cable T.V.), Direct-to-home (DTH) services, Internet Protocol Television (IPTV) services, Headend-in-the-Sky (HITS) services, and terrestrial T.V. services provided by Doordarshan, the public broadcaster.
3. It quotes the **FICCI/EY** report to say that the most important segment is Television at

approximately **50%**, with digital media at **17%** and newspaper at **14%**.

4. It further summarises the state of the Television industry in the past two years as standing at **INR 68,5002 crores** in **2020** compared to **INR 78,8002 crores** in **2019**. Subscription revenues account for around **60-65%** of the overall industry revenue. Subscription revenues have fallen from **INR 46,8002 crores** in **2019** to **INR 43,4002 crores** in **2020**.
5. On a similar note, advertisement revenue during **2020** was **INR 25,1002 crores** compared to **INR 32,0002 crores** in **2019**. The decline is mainly attributable to the COVID 19. However, as the spread of coronavirus reduces, "*the Television industry has*

*registered an upward movement, improving the situation.*"

6. As per the latest report issued by the **Broadcast Audience Research Council, India (BARC)** in **June 2021**, in the first half of **2021**, weekly T.V. viewership stood at an average of **921 billion** viewing minutes.
7. **TRAI** has revealed that as the T.V. Broadcasting Sector currently encompasses
  - ◆ **357 broadcasters** with **912** private satellite T.V. channels permitted by the MIB on **August 31, 2021**. These channels comprise **388 News and current affairs** channels and **524 non-news and current affairs** channels as of **August 31, 2021**. (**915 channels** as per MIB as of **December 2021**)

◆ **1733 registered MSOs** as of **September 1, 2021**. (1747 as per MIB in **December 2021**). There are **1,55,303 Cable operators** as of **March 2021**, with **73 million** Cable T.V. subscribers. **Top 14**

MSOs serve **45.7 million** subscribers.

◆ **1 HITS operator** with **2.15 million** subscribers

◆ A few **IPTV operators**.

◆ **4 pay DTH operators** with

**70.99 million** active DTH subscribers.

◆ **1 Free-To-Air DTH** service in India known as **Free Dish/ Terrestrial Service** with **38 million** combined subscribers.

## C. SIGNIFICANT DEVELOPMENTS IN THE BROADCASTING WORLD

### ZEE-SONY MERGER A VICTORY FOR THE GOENKA FAMILY?

1. **Zee TV** and **Sony T.V.** announced their merger on **December 22, 2021**, creating a media behemoth that can stand up to **Disney Star/Hotstar** in both Television Broadcasting and OTT Streaming networks.

2. The press release issued by **Sony T.V.** stated:

◆ *Sony Pictures Networks India Private Ltd. ("SPNI"), a wholly owned subsidiary of Sony Group Corporation ("Sony"), today announced that it has signed definitive agreements to merge a publicly listed Indian media and content company, Zee Entertainment Enterprises Ltd. ("ZEEL"), with and into SPNI.*

◆ *This follows the conclusion of negotiations of the definitive agreements based on the non-binding term sheet previously announced on September 22, 2021.*

◆ *After closing this transaction, the new combined Company will be publicly listed in India.*

*Under the terms of the definitive agreements, Sony Pictures Entertainment Inc. ("SPE"), the indirect parent company of SPNI, through SPE's subsidiaries, will invest approximately **1.06 billion U.S. dollars** (assuming an INR: the USD exchange*

*indirectly hold a majority stake of **50.86%** in the combined Company. The closing of the transaction is subject to certain customary closing conditions, including regulatory, shareholder and third-party approvals."*

◆ ***Mr Punit Goenka** will lead the combined company as its Managing Director & CEO. The majority of the Board of directors of the combined company will be nominated by the Sony Group. It will include the current SPNI Managing Director and CEO, Mr. N.P. Singh. On closing, Mr Singh will assume a broader executive position at SPE as Chairman, Sony Pictures India (a division of SPE), reporting to Mr Ravi Ahuja, SPE's Chairman of Global Television Studios and SPE Corporate Development.*

◆ *The combination of **ZEEL** and **SPNI** is expected to achieve business synergies, and given their relative strengths in scripted, factual and sports programming, respective distribution footprints*



*rate of **75:1**) into SPNI as growth capital at closing for use by the combined Company to pursue growth opportunities and will pay a **non-compete fee of 147 million U.S. dollars** (assuming an INR: the USD exchange rate of **75:1**) to certain promoters (Founders) of **ZEEL**.*

◆ *As a result of the transaction, Sony will*



across India and iconic entertainment brands, the combined company should be well-positioned to meet the growing consumer demand for premium content across entertainment touchpoints and platforms.

◆ The seamless blend of rich expertise in content creation, deep consumer insights and success across entertainment genres is expected to drive the combined company's ability to accrue higher shareholder value.

◆ Under the stewardship of the Sony Group, a global leader in consumer technologies, gaming and entertainment, the combined company is expected to better compete with the world's largest streaming players.

3. The existing promoters of Zee will own **3.99%** (with an option to raise their holding to **20%** from open market purchases (this may also get funded from the **non-compete fees** being paid by Sony). Zee public shareholders will own the remaining **45.15%**.

4. **Invesco** is a critical public shareholder with an **18% share** and has an ugly dispute going on with Zee, especially the MD/CEO **Mr Puneet Goenka** in the NCLT/Bombay High Court, which is sub-judice. Details of the dispute are provided later.

5. The combined size of the new entity will have **75** linear T.V. channels (**ZEE-49** channels and **Sony 26** channels.). The estimated combined reach will be **173 countries** with a reach of **1.3**

**billion** viewers. There are also two streaming services, **Zee 5**, and **Sony Liv**. There are two studios, **Zee Studios** and **Sony Pictures Films India**, and a digital content studio, **Studio NXT**.

6. As per **BARC (Broadcast Audience Research Council)**, five channels of **Sony** and **Zee** figure in the top ten channels watched. **Sony Sab** is only next to **Star Plus** in GEC popularity. **Zee** is very strong in regional channels like **Zee Anmol** and **Sony** in Sports and General Entertainment. The merged entity of **Sony-Zee** is estimated at a market share of **26.7%** against **18.6%** of **Star-Disney**.



7. A Leading Media Analyst, **Karan Taurani** of **Elara Capital**, feels that the merger, when complete, will provide "favourable cost synergies" in T.V.; "a good content execution in digital offerings due to the wide choice of available content".

8. In the **best estimate** scenario, he estimates:

◆ *Sony-Zee together could command a whopping **22%** of the advertisement revenue market.*

◆ *As the combination offers a wide variety of content across various genres, the "negative impact" of **NTO:2** will be relatively subdued*

as **Sony-Zee** can efficiently bundle their best channels (into attractive and compelling packages).

◆ The Analyst is upbeat that both **Disney-Star** and **Sony-Zee** could become "irreplaceable given their sheer size of advertisement share (**45%**) and may gain market share" (at the cost of the other content aggregators).

◆ **Elara Capital** estimates the **Sony-Zee** TV business (excluding digital revenues) at **INR 814 Billion**. The estimated size of the consolidated digital business is **INR 91 billion**.

9. In a post-deal interview, the M.D. and CEO, **Mr Puneet Goenka**, expressed willingness to talk to **Invesco** about the merger if "they are interested." A key factor is that **Invesco's** current **18%** shareholding will be reduced to **11%** in the merged entity, reducing their leverage but giving them a significant share in a much larger merged entity.

10. The **Invesco** dispute started before the **Sony Zee** initial **MOU** of **September 2021** with a demand for an emergency general body meeting (EGM) to change the Company's independent directors and the MD/CEO, **Mr Puneet Goenka**, on the grounds of its concerns about various corporate governance issues and charges of "financial irregularities" and "dubious related party transactions" which had also been statedly highlighted by SEBI the market regulator.

11. This led to litigation in the NCLT/ NCLAT and the Bombay High

Court. In a series of litigations by both parties ultimately, the Invesco requisition for an EGM to select new independent directors and take a call on the continuation of Mr Puneet Goenka as MD/CEO is now subject to orders of the Division Bench of the High Court.

12. In a judgment of **October 25, 2021**, the single Bench of the Bombay High Court granted an injunction in favour of **Zee** on its civil suit seeking an injunction against the requisitioning and holding of the EGM on the ground that the resolutions proposed by Invesco are *illegal and ineffective*. Hearings are in progress before the Division Bench of the Bombay High Court, and a judgment may be pronounced in the early part of 2022.

13. There have been unsubstantiated allegations that **Invesco** is not merely acting for itself but the **Reliance Group** with whom merger discussions were held with **Zee**

but did not fructify. **Reliance** was ultimately forced to issue a press release on **13.10.2021** rejecting such allegations and stating that:

◆ “We had made a broad proposal to merge our media properties with **Zee** at fair valuations of **Zee** and all our properties. The valuations of Zee and our properties were arrived at based on the same parameters,” **RIL** said.

◆ The Company noted that its proposal sought to “harness the strengths of all the merging entities and would have helped to create substantial value for all, including the shareholders of **Zee**.”

◆ “**Reliance** always endeavours to continue with the existing management of the investee companies and reward them for their performance. Accordingly, the proposal included the continuation of **Mr Goenka** as Managing

*Director and the issue of ESOPs to management, including **Mr Goenka**.”*

◆ However, differences arose between **Mr Goenka** and **Invesco** with respect to a requirement of the founding family for increasing their stake by subscribing to **preferential warrants**. The investors seemed to view that the Founders could always increase their stake through market purchases. “At **Reliance**, we respect all Founders and have never resorted to any hostile transactions. So, we did not proceed further.”

14. Apart from the **Invesco** imbroglio, a series of other permissions are required to complete the merger process, which could take around a year or more. These include the Competition Commission, NCLT, Creditors and Ministry of Information and Broadcasting, and most importantly, public shareholders, including FIIs and Retail investors.

## COMMENT

*Either way, this matter will ultimately be settled by a Supreme Court final judgment once the Bombay High Court pronounces its verdict. The final verdict has important company law implications for the rights of foreign and Indian large shareholders.*

*A compromise between the Company and its principal public shareholder Invesco is in the best interest of all parties but unlikely at present in the considered view of this writer.*

*Surprisingly, the successful signing of the December 2021 agreement led to a fall in the share price.*

*There could be two reasons- some critics/observers (including this writer) are not entirely convinced that all corporate governance concerns will automatically be addressed by a new Board having a majority of Sony's nominee directors.*

*The second and valid reason could be that Invesco's concerns and stance on corporate governance and dropping Mr Puneet Goenka as MD/CEO remain unchanged.*

*Finally, the completion of the merger is still a year away.*

*This is a unique first time Sony funded mega venture. When all troubles are smoothened out, this will create a strong Media Company able to stand up to Star Disney and other T.V. networks and Netflix and Amazon Prime on the digital content front. This writer sees great synergy in the planned combination.*



## D. LEGACY DISTRIBUTION MEDIA TURNING STAGNANT?

1. **BARC (Broadcast Audience Research Council)**, in its **April 2020 T.V. Universe Estimates** released a year later in **April 2021**, estimates **300 million** homes with approximately **210 million** homes having access to Television. This is a **startling figure** meaning there is scope for another **90 million** no T.V. homes for the sector to grow.
2. The Estimates state that "T.V. households have increased in Urban and Rural markets by **4%** and **9%**, respectively. In absolute terms, there is an increase in T.V. households of nearly **3.2 Mn** in Urban India and **10.3Mn** in Rural India. T.V. households grew in all town classes of Urban markets, with megacities growing by **6%**."
3. "T.V. households increased in all reporting States/State Groups in **2020**. The growth in overall **HSM** states is relatively higher than the South states due to an already high T.V. penetration. Bihar/Jharkhand, Assam/N.E. and Odisha have seen **double-digit** growth in T.V. households."
4. "As per the updated **Universe Estimates, NCCS A and B (Socio-Economic Status)** proportion has increased to **27%** and **31%**, respectively. **NCCS DE** has further contracted to **9%** of overall T.V. households in the country."
5. "The Composition of Mode of Signal Reception (**MOSR**) in the country has also changed over this period. The share of **D.D. Free Dish** has increased to **19%** from **13%** in **2018**, and the share of Cable T.V. has decreased to **48%**."
6. "The increase in the T.V. population has resulted in overall growth in T.V. viewership. In line with the population's regional growth pattern, T.V. viewership has grown more in Bihar/Jharkhand, Assam/N.E., and Odisha. Similarly, T.V. viewership of **upper NCCS (A and B)** has increased due to the increase in population. In contrast, **lower NCCS profile (NCCS CDE)** has seen a drop of around **12%** at all India level."
7. As available in the **October 2021** Consultation paper on Cable monopoly, TRAI data summarises T.V. viewing through various distribution modes totalling **184.14 million** subscribers. These include
  - ◆ **73 million** Cable T.V. subscribers. **Top 14 MSOs** serve **45.7 million** subscribers.
  - ◆ **1 HITS** operator with **2.15 million** subscribers.
  - ◆ **4 pay DTH** operators with **70.99 million** active DTH subscribers.
  - ◆ Few **IPTV** operators. (negligible).
  - ◆ **1 Free-To-Air DTH** service in India known as **Free Dish/ Terrestrial Service** with **38 million** combined subscribers.
8. **TRAI** indicated the total Cable T.V. subscribers, and the **HITS** Cable subscribers are added up (**73 million+ 2.15 million**). The combined figure is **75.15 million**, **25%** less than the commonly accepted Cable T.V. base of **100 million** subscribers, even noted by **TRAI** in its latest Broadband recommendations. **BARC** estimates the total number of T.V. homes at 210 million homes. The discrepancy of **25.86 million** is significant and needs resolution in perhaps joint sharing of data between **TRAI** and **BARC**.
9. While there is no **empirical evidence** of significant loss of Cable subscriber base and shift to DTH, there is a significant assertion by the Broadcasters in their **October 2021** affidavit in the **NTO:2 Special Leave Petition** pending in the Supreme Court to the effect that due to adverse impact of **NTO:2**, the Cable industry has lost **15-20 million** subscribers. No factual data was shared and amounts to sabre rattling by Broadcasters in the considered view of this writer.
10. **Media Partners Asia** recently claimed that "Cable (in India) as a standalone video service is on a **structural decline**". No major foreign investor has entered the sector though 100 per cent FDI is allowed
11. Recent estimates by **TRAI** show that DTH is also losing ground. As per its latest reports, the DTH sector **decreased** by **1.42 million** subscribers during the first quarter of **2021**. Pay DTH has attained a total active subscriber base of around **69.57 million** in the quarter ending **March 31, 2021**. This was, however, down from a **2020 peak** of **70.99 million**

subscribers at the end of the year and the lowest subscriber total since **Q3 2019**, when the sector was at **69.3 million**. However, in **quarter 2 of 2021**, DTH managed to add another **2,90,000** subscribers.

12. Regarding the current subscriber share, **Tata Sky** is the largest, with a **33.3%** market share, followed by **Bharti Telemedia** with **25.54%**, **Dish TV India** with **24.09%** and **Sun Direct T.V.** at **17.07%**. While **Tata Sky/Bharati Telemedia** and **Sun T.V.** increased their subscriber base, **Dish T.V.** base dwindled. *There is talk of merger talks between Dish TV and Bharati Telemedia*

*but routinely denied by both parties.*

13. **Selectra** quoting **TRAI** data has summarised highlights of the DTH sector as below:

- ◆ **Tata Sky** offers **600** channels, out of which **99** are H.D. channels.
- ◆ **Bharti Airtel** provides nearly **500** channels, including many H.D. channels. The number of subscribers of **Bharti Airtel DTH** grew over **10 million** significantly.
- ◆ **Dish T.V.** offers more than **300** channels tailored as per the viewer's choice.
- ◆ **Dish T.V.** and its branches

have over **17.7 million** subscribers.

- ◆ **D2H** is a subsidiary of Dish T.V. and has **19%** of the total subscribers.
- ◆ **D2H** has around **650** channels available all over India.

14. The **Financial Express** has estimated the size of the DTH Sector at **Rs. 22000 crores** with approximately **37 %** of total T.V. subscribers. While it has shown a marginal decline due to Covid lockdown (and perhaps marginal cord-cutting to OTT), it has been relatively stable even if growth is sputtering.

## COMMENT

*There is no doubt that legacy distribution media is facing de-growth currently. While blame is being laid by Broadcasters on the so-called adverse effect of NTO:2, this writer would, based on his personal, professional experience of the past 25 years in distribution media, submit that BARC data released in April 2021 indicates a total of 300 million homes against which BARC indicates 210 million homes having a T.V. set. This leaves 90 million uncovered T.V. dark homes.*

*Put another way, if TRAI data released in October 2021 is correct (there is no reason to doubt it), the number of T.V. homes where Cable and DTH can reach is 125 million homes. By any stretch, this is a huge gap that can be covered over the next 5 years.*

*While Tata Sky and Airtel DTH are branching out beyond vanilla offerings, the vast Cable industry is making no effort. They simply have to start offering a variety of services not limited to traditional T.V. but high-speed broadband/OTT offerings and even cyber and home security on a single bill to retain their customer base.*

*Viewers have many choices, and they have the power of the purse and control of the remote. Large Multi-System Operators must wake up and smell the coffee.*

## E. BROADBAND – A MISSED OPPORTUNITY FOR CABLE

As per **National Telecom Policy 1999**, the Cable Industry had been especially singled out for policy initiative for broadband, stating that

- ❖ *Under the provisions of the **Cable Regulation Act, 1995**, Cable Service Providers (CSP) shall continue to be freely permitted to provide 'last mile' linkages and switched services*

*within their service areas of operation and operate media services, which are essentially one-way, entertainment-related services.*

- ❖ *Direct interconnectivity between CSP's and any other type of service provider in their area of operation and sharing of infrastructure with any other*

*type of service provider shall be permitted. Interconnectivity between service providers in different areas shall be reviewed in consultation with TRAI.*

- ❖ *In view of convergence, it is highly likely that two-way communication (including voice, data, and information services) through Cable*

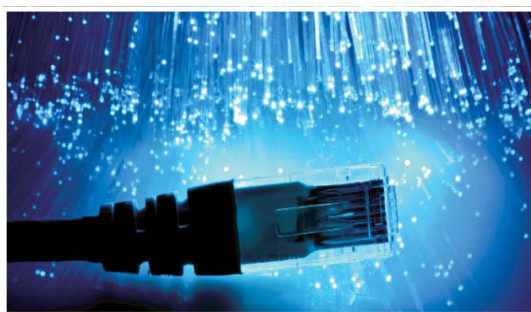


networks would emerge in a significant way in future. Offering these services through the Cable network would be tantamount to providing fixed services.

- ❖ Accordingly, in case the above two-way communication services are to be provided by CSPs utilising their network, they would also be required to obtain an FSP licence and be bound by the licence conditions of the FSPs, to ensure a level playing field.

1. The latest **Telecom Subscription Data** as of **31.10.2021** released in late **December 2021** reveals a wide skew between **774.39 million** wireless and **24.55 million** wireline broadband subscribers.
2. The **top five** service providers constituted **98.69%** of the total broadband subscribers market share at the end of **October-2021**. These service providers were Reliance Jio Infocomm Ltd (**430.75 million**), Bharti Airtel (**208.71 million**), Vodafone Idea (**122.47 million**), BSNL (**24.57 million**) and Atria Convergence (**01.97 million**)
3. As of **October 31, 2021**, the top five Wired Broadband Service providers were **BSNL (04.72 million)**, **Reliance Jio Infocomm Ltd (04.16 million)**, **Bharti Airtel (03.98 million)**, **Atria Convergence Technologies (01.97 million)** and **Hathway Cable & Datacom (01.07 million)**.
4. The **Indian Telecom Services Performance Indicators April – June 2021**, released on **October 21, 2021**, states that out of

**833.71 million** internet subscribers, **792.78 million** were broadband subscribers, and **40.93 million** were narrowband subscribers. Wired Internet subscribers **decreased** from **25.99 million** at the end of **Mar-21** to **23.58 million** at the end of **Jun-21**, with a quarterly decline rate of **09.31%**. Wireless Internet subscribers **increased** from **799.31 million** at the end of **March 21** to **810.13 million** at the end of **Jun-21** with a quarterly growth rate of **01.35%**.



5. Out of total internet subscribers, **97.09%** use mobile devices to access internet service. Wired internet subscribers are only **02.83%** of total internet subscribers at the end of **Jun-21**.
6. This clearly shows that the Cable industry has failed to provide high-speed broadband to its subscribers, leaving it open to the telecom companies to supply broadband today even though in these lockdown times, broadband is as essential as *Roti Kapda Makaan*.
7. **TRAI** well recognises the importance of the Cable industry in the growth of broadband in India in its latest recommendation sent to the Government in **August 2021**, stating

## ◆ **Cable T.V. (CATV) Broadband/ HFC access:**

Based on census **2011**, India has **249.5 million** households. Globally, Cable broadband has become very popular as it is less expensive, quick to deploy and easier to handle. CATV broadband is usually offered to customers via the existing CATV network. This infrastructure can deliver higher broadband speeds with reliability as compared to DSL.

- ◆ Using this technology, super-fast speeds are possible if the infrastructure is properly upgraded, and distances are kept short. However, in the case of CATV, broadband bandwidth is shared among several users, reducing its availability during peak traffic periods.

- ◆ **Hybrid fibre coaxial (HFC)** networks have been commonly deployed globally by Cable television operators. The subscribers are connected to the Cable operator's serving nodes on one end via coaxial Cables in an HFC network. In contrast, the other end of the nodes is connected to the Cable system's distribution centre (called the headend) through an optical fibre Cable.

- ◆ In India, the Cable T.V. industry reaches around **100 million** households, deep into urban and rural areas. These Cable T.V. networks are operated by more than a lakh Cable Operators.

- ◆ Because of its affordability and ubiquity, Cable broadband could be, for India, a super-fast highway for broadband communications for most homes and businesses in the near future. However, this powerful resource for broadband delivery has not been tapped adequately in our country.

## Recommendation of TRAI

- ◆ The Authority agrees that there are certain challenges involved in using existing Cable T.V. networks to deliver broadband services that need to be addressed. Cable Operators have an inherent strength in providing last-mile access. The sheer reach of the Cable network to a large number of households renders this infrastructure both amenable and ideally suited to the delivery of broadband to a large segment of the population very quickly.
- ◆ Internationally, the growing convergence of Cable broadcasting and broadband networks is recognised. In many developed countries,

broadband is, in effect, mainly delivered through the Cable system.

- ◆ In India, Cable Operators can also play an essential role in providing broadband if an **appropriate policy framework** is put in place. For accelerated growth of Cable broadband, a harmonised effort is required by the industry and the Government.
- ◆ The Authority agrees with the stakeholders view that in addition to the requirement of re-skilling Cable Operators for better customer service and up-gradation of existing Cable networks, the issue relating to the inclusion of revenues from broadcasting for levy of Licence Fees need to be addressed as it is acting as a significant deterrent for Cable operators in providing broadband services.
- ◆ In this digital age, when linear T.V. is giving space for online video streaming, Cable operators are also looking to become ISP and upgrade their networks to deliver broadband services. However, when a Cable

operator decides to become ISP, it must pay the license fee on revenues earned from Cable T.V. services, which otherwise is exempted from the license fee. This acts as an obstacle in Cable operators becoming ISP.

- ◆ Once this issue is resolved, many Cable operators may acquire an ISP license; and they will automatically invest and upgrade their access network infrastructure and technology. The issue relating to the payment of the license fee on adjusted gross revenue, which includes the revenue accrued from Cable T.V. services also, have been addressed by the Authority in its Recommendations to the Government on "**Definition of Revenue Base (AGR) for the Reckoning of Licence Fee and Spectrum Usage Charges**" dated January 6, 2015. The Government's decision on the matter is still awaited.

- On **15.09.2021**, new telecom reforms were announced whereby non-telecom revenue will be excluded on a prospective basis from the definition of **AGR**.

## COMMENT

*Hopefully, this will give an impetus to the Cable Industry to take ISP licences and rapidly provide its 100 million Cable subscribers with high-speed broadband services.*



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## F. ADVENT OF SATELLITE BROADBAND

1. A significant development in alternate technologies is the impending advent of satellite broadband in India. **Selectra** explains the provision of satellite broadband as under:

- ◆ *The whole transmission process starts with your ISP sending a fibre internet signal to a satellite (in space).*
- ◆ *The internet signal then reaches you and is hooked by your satellite dish.*
- ◆ *Your satellite dish connects to your modem (like it has always been).*
- ◆ *Your modem then sends internet signals to your device.*
- ◆ *Finally, the whole process reverses back to your ISP, and satellite broadband is provided.*
- ◆ *One does not need to rely on fixed connections with satellite broadband as it works similar to DTH. In addition, with Satellite internet, users can gain two-way access to internet services in some of the world's most remote locations.*

2. Satellite broadband providers include **Airtel, One Web, SpaceX technologies**, and **Hughes**. **One Web**, jointly owned by **Bharti Global** and the U.K. government, plans to launch satellite broadband in India by **mid-2022**. Through its brand **Starlink**, **SpaceX Technologies** has grown to over **1,700** satellites through **2021** and will eventually consist of many

thousands of mass-produced small satellites in low Earth orbit (**LEO**), which communicate with designated ground transceivers. The U.S. satellite maker, **Hughes Network Systems**, is investing in a **\$500 million satellite** and will spend **\$300 million** more on ground-level gear. **Bharti** states, "every month, you will see a launch; we need to send **650 satellites**; they will go up by **April 2022**. Then, we will be up



and running. This will be nothing but Telecom in space."

3. **TRAI** issued a consultation paper on **Licensing Framework for Satellite-based connectivity** for low bit-rate applications in **March 2021**. The primary consultation is whether:

- ◆ *There are two models of provision of satellite-based connectivity for IoT and low-bit-rate applications—*
  - (i) *A hybrid model consisting of LPWAN and Satellite and*
  - (ii) *Direct to satellite connectivity.*
  - (iii) *Whether both the models should be permitted to provide satellite-based connectivity for IoT devices and low-bit-rate*

*applications? Please justify your answer.*

- (iv) *Is there any other suitable model through which satellite-based connectivity can be provided for IoT devices? Please explain in detail with justifications.*

4. TRAI received ten responses from various companies and Associations. It is still to issue its recommendations though a year has passed from the original request of the **Department of Telecommunications**.

5. A vital issue causing a dispute between **Jio**, and **Airtel** is **whether frequencies should be auctioned or** administratively allocated.

- ◆ **Jio** has expressed the view that assignment of such spectrum should be only through the auction route, in step with the Supreme Court's 2012 judgment -- that had backed allocation of airwaves via transparent auctions -- and also comply with the "same service, same rules" principle.

- ◆ **Airtel** holds the opposite view, stating that allocation of satellite gateway spectrum through "the administrative route" is in line with global practices, warning that any move to auction would cause segmentation of airwaves and drastically drive down the efficiency of satellite broadband services to lower levels.

6. **Statista** states that "Cable internet is faster and cheaper

than satellite broadband compared to Cable broadband. Cable internet services on an average range between **20 and 1000 Mbps**. However, if you

reside in a remote location, you may not have access to Cable internet at all. Satellite Broadband may be an option there. **Satellite broadband in**

**India** may be suitable for rural residents who do not readily access traditional telecom infrastructures such as Cable or Fibre."

## COMMENT

*A matter of importance is that with saturation in urban India by Cable and DTH and, to some extent, Free Dish, rural India' is India's new battleground for TV and broadband penetration.*

*Here Cable ISPs will find it challenging in remote areas to install high-speed broadband. This writer visualises a possible creative partnership with satellite broadband networks with MSOs and Cable Industry in future, especially in remote regions like hilly states and the Northeast.*

*The single HITS platform NXTDigital will ultimately benefit once a rational policy is announced. It has unique Cable Operator Premises equipment installed in over 1200 locations which can easily be rewired to provide high-speed satellite broadband where fibre reach is difficult. Of course, this will depend on Government allowing infrastructure and customer sharing.*

## G. TAKEOVER BY STREAMING NETWORKS FROM LEGACY MEDIA?

1. **IBEF December 2021** estimate quotes international research estimates to state that according to the '**India: Online Video Trends and Omdia Consumer Research Highlights**' report published by **Omdia** (published in **2021**), the **Indian SVOD** market, with OTT video subscriptions, reached **~62 million** in **2020** from **~32 million** in **2019**. This is a massive jump of **30 million** subscribers.

- ◆ OTT sector has seen an increase of **30%** in paid subscribers. The number of paid users increased from **22.2 million** to **29.0 million** (**March and July 2020**)

- ◆ The **Top five metro** cities account for **46%** of India's total OTT video platform subscribers.

- ◆ Regional content on OTT platforms attracts **90%** of consumers, while only **07%** watches English content.

- ◆ **ZEE5** achieved a viewership of **437.4 million** (**March**

**2020 to April 2021**). Disney Hotstar and Netflix together account for **78%** of India's total online video subscription market.

- ◆ The Indian OTT market expects to reach a target of **Rs 237.86 billion** (**US\$3.22 billion**) by **FY25**.

- ◆ "Key growth drivers included rising demand for content among users and affordable subscription packages."

2. **Market Research.Com** provides interesting insights into the exploding growth of the Indian OTT market. It states

- ◆ *The OTT market can be segmented into video and audio OTT. The video OTT market in India was valued at **INR 86.98Bn** in **F.Y. 2020**. It is expected to expand at a compound annual growth rate (CAGR) of **~30.73%** during the **F.Y. 2022 – F.Y. 2026**. Original premium content, especially in*

*regional language, is one of the biggest growth drivers and differentiators because several OTT platforms are vying for consumers' attention.*

- ◆ *The audio OTT market was valued at **INR 44.21 Bn** in **F.Y. 2021** and is expected to reach **INR 99.98 Bn** by **F.Y. 2026**, expanding at a **CAGR of ~19.14%** during the **F.Y. 2022 – F.Y. 2026** period. An increased focus on launching original music will help these platforms acquire new users, ultimately expanding the overall user base.*

3. Yet another research organisation **Selectra** has provided a fascinating slice of information drawn from **Statista** on the current OTT adoption/ Digital Media in India:

- ◆ *The revenue from OTT platforms rose to approximately **19 billion Indian rupees** in the fiscal*

year 2020. It is expected that by 2022, this will rocket up to **46 billion rupees**.

- ◆ **2019-2020 saw the highest annual growth for Indian Entertainment Digital Market.**
- ◆ **The market value for digital media growth rate in India has recorded a hike of 49 per cent across the entertainment industry during 2019 -2020.**
- ◆ **Online gaming follows at an 18 per cent growth rate.**
- ◆ **Indian Digital media market is valued at 235 billion Indian rupees in 2020 and is estimated to hit 424 billion rupees by 2023.**
- ◆ **In 2020, Video Subscriptions revenue dominated digital media with over 42 billion Indian rupees, expected to reach 83 billion rupees by 2023.**
- ◆ **Audio subscription revenue over 1 billion rupees.**
- ◆ **In India, revenue from OTT reached more than two billion U.S. dollars in 2020. By 2026 this will rise to 7 billion.**
- ◆ **Paying Indian subscribers came to 29 million in 2020**

with **53 million** video subscriptions.

- ◆ **The film entertainment market's overall revenue exceeded 70 billion Indian rupees in 2020. Disney+ Hotstar, Netflix, Amazon Prime Video, and YouTube prove significant contributors to streaming content.**
  - ◆ **Disney+ Hotstar leads as the main OTT provider with 29 percent. It reported over 16 billion Indian rupees revenue in 2020. Disney+ Hotstar provides over 100,000 hours of T.V. entertainment as content & movies across 9 languages. It is expected to reach 46 Million Subscribers by December 2021.**
  - ◆ **Jio TV ranks second with 23 percent.**
  - ◆ **Amazon Prime Video stays third with approximately 38 million unique visitors in India.**
4. **Media Partners Asia** forecasts that:
- ◆ **India will enjoy one billion video screens by 2024.**
  - ◆ **85% of Indian Subscribers will be broadband-ready by 2024.**

◆ **OTT streaming industry will invest \$1 billion in content only in 2021.**

◆ **Direct to consumer SVOD subscribers are expected to grow to 193 million by 2026**

◆ **SVOD revenues will reach above \$1.8 billion by 2026 from \$800 million in 2021.**

5. **YouTube** had announced in **October 2020** that it had over **325 million 18+ unique viewers** month on month in India, quoting Comscore data from **May 2020**.

6. **Mordor Intelligence** has forecast massive growth in **smart T. Vs in India**, stating

◆ **The Smart (Intelligent) T.V. market is expected to register a CAGR of 16.52% during the forecast period from 2021 to 2026. With the preliminaries of the fourth industry generation, connected T.V. manufacturers compete for the latest innovations in the user interface, content aggregation, and application development. Intelligent T.V.s come with an operating system that can run apps and widgets to stream videos and music.**

## COMMENT

*These staggering figures should act as a wake-up call for the legacy distribution industry of Multi-System Operators/Cable Operators and DTH Networks. No precise figures of cord-cutting are yet available in India. Still, the adoption of streaming platforms is an unstoppable shift from traditional viewing patterns.*

*Tata Sky and Airtel DTH have launched hybrid boxes though the precise adoption rate is unknown and perhaps minuscule. No such data is available for MSOs like Hathway/Den and NXT Digital.*

*With the recent amendments in Telecom AGR for Cable ISPs, it is time that the main MSOs step up investment in Broadband services in their subsidiaries to cater to viewers who may be tired of traditional ad filled T.V. services. This will enable their customers to consume OTT platforms.*

*Another possibility is for Multi-System Operators to enter into special distribution arrangements with Netflix, Amazon Prime, and even Hotstar and regional OTT platforms to provide streaming services, primarily through broadband subsidiaries, to create higher customer retention.*



## H. ONLINE GAMING HAS TAKEN HOLD WITH REGULATORY UNCERTAINTY

1. In a recent estimate, **Invest India**, a Government of India National Investment and Promotion Agency, has stated that India is globally among the five top gaming markets. It estimates a staggering **560 million** online gamers and **250 million** mobile gamers in India. There are over **15000** game developers and **275** game development companies in India. Its size is estimated at **30** million USD and has a CAGR of **40%** in **2016-2020**.
2. The Indian Government has announced that it will set up the **Animation, Visual Effects, Gaming and Comic (AVGC) Centre for Excellence** in collaboration with **IIT Bombay**. Karnataka is the first Indian state to have an **AVGC Policy**. Telangana and Maharashtra are other states with effective implementation of **AVGC policies**.
3. One example is **Dream Sports** which started in **2008** – which envisioned "*bringing Indian sports fans closer to their favourite sports, inspiring them to become active participants from passive viewers, with the power of technology. Starting with a simple online fantasy sports format, we pivoted to a freemium format in 2012 and since then, have been the fantasy sports platform of choice for over 120 million users.*"
4. **Ludo King** is an Indian free-to-play mobile Game application developed in **2016** by Indian studio **Gametion Technologies Pvt Ltd**, based in Mumbai, India. It is available on Android, iOS, Kindle, Windows Phone and Microsoft Windows platforms. The game is a modernisation of the board game **Ludo**, which in turn is based on the ancient Indian game of **Pachisi**. **Ludo King** was first released on **February 20, 2016**, on the Apple App Store and has consistently ranked **No. 1** in the Top Free Games Section of the Apple App Store and the Google Play Store. It is the first Indian gaming app to pass **500 million** downloads. Ludo King is played in **30 countries** and is available in **14 languages**.
5. **Mobile Premier League is a third gaming major**, commonly abbreviated as **MPL**, started in **2018**. It is a mobile gaming application holding mini-game tournaments through its platform. **MPL** allows users to participate in several types of gaming contests held in-game, as individual users or forming teams with other users. Game types include racing games, sports games, and first-person shooting games. A number these contests offer monetary rewards to the winners. The mobile application is available on most platforms.
6. Recently the Karnataka Government issued the **Karnataka Police (Amendment) Act, 2021**, prohibiting all forms of online games involving betting, wagering, and gambling of any kind in the state. This has been challenged in the H.C., and hearings are pending. The new law seeks to strengthen the **Karnataka Police Act** by making gambling a cognisable and non-bailable offence, as well as curbing the threat of "*gaming through the Internet, mobile apps.*" Further, it will forbid all types of online betting and gambling platforms to function in the state, including "*games of skill*" like fantasy sports, rummy, and poker. The Government has also made it illegal to play online games that involve "*electric means and virtual currency [or] electronic transfer of funds in connection with any game of chance.*" However, the amendment makes an exception for lottery and betting on horse races.
7. The Kerala High Court recently struck down a law prohibiting online rummy from violating the constitution. In **August 2021**, the Madras High Court also struck down a similar law passed by the Tamil Nadu government banning online gaming. And while the high courts of **Punjab and Haryana, Bombay and Rajasthan** have held that online betting games can be lawful, the High Courts of **Delhi and Gujarat** have ordered their state governments to take action.

### COMMENT

It is ironic that while the Government has recognised this activity as a sunshine segment of the Media Industry as gambling is a state subject, state governments have stepped in to pass laws to ban online gaming. Consequently, the legality of online betting games like rummy and fantasy sports varies from state to state. There is clearly a mismatch between Union Government promoting the sector and state government regulations. One answer could be a model Law adopted by progressive states.

## I. ROUNDUP OF REGULATIONS/SIGNIFICANT LITIGATION AFFECTING MEDIA SECTOR IN 2021/2022

### REGULATIONS

#### NEW TELECOM ACT



1. The Minister for **Electronics, Information Technology and Communications, Mr Ashwini Vaishnaw**, told **Bloomberg** in mid-**December 2021** that *"Telecom is still governed by an Act made in 1885, but things have changed dramatically. And the regulations which flow out of the law are also 60-70 years vintage," Mr Vaishnaw said, referring to the colonial-era Indian Telegraph Act that gives the exclusive Government jurisdiction on the sector. "We are looking at a complete regulation revamp."*
2. The Government is exploring ways to allow companies to **merge, expand and operate** without multiple bureaucratic approvals to avoid subsequent court battles.
3. Mr Vaishnaw urged the industry to recommend coping with rapid changes in technology, making telecom networks secure, further improving the regulatory architecture, and making digital services more inclusive.
4. He said there were paramount concerns among all nations regarding the security of telecom networks. *"People want the devices, equipment and network O.S. to be from trusted sources. New geopolitical realities are staring at all of us,"* he explained, asking the industry to give suggestions on what will be a "good framework" for people to have trusted sources, trusted equipment and also increase the overall trust in the telecom sector.
5. This announcement was preceded by a series of significant telecom reforms announced in **September 2021**, mainly on the issue of sharing of telecom revenues (**AGR**) which provided relief to the telecom majors like **Airtel/Vodafone Idea** and **Jio** on one hand and Cable ISPs like **Hathway/One Broadband** on the other.

#### REVAMPED CABLE T.V. ACT?

1. The Central Government issued a notification in **June 2021** amending the **Cable Television Network Rules, 1994**, thereby providing a statutory mechanism for *redressal of grievances/complaints of citizens relating to content broadcast by television channels in accordance with the provisions of the Cable Television Network Act, 1995.*
2. *At present, there is an*

*institutional mechanism by way of an **Inter-Ministerial Committee** to address citizens' grievances relating to violation of the **Programme/Advertising Codes** under the **Rules**. Similarly, various broadcasters have also developed their internal **self-regulatory mechanism** for addressing grievances.*

3. *However, a need was felt to lay down a statutory mechanism for strengthening the grievance redressal structure. Some broadcasters had also requested for giving legal recognition to their associations/bodies.*
4. *The **Cable Television Network Rules** have been amended to provide for this statutory mechanism, which would be transparent and benefit the citizens. At the same time, self-regulating bodies of broadcasters would be registered with the Central Government. At present, over 900 television channels have been granted permission by the **Ministry of Information and Broadcasting**, all of which are required to comply with the **Programme and Advertising Code** laid down under the **Cable Television Networks Rules**.*
5. *The notification has paved the way for "a strong institutional system for redressing grievances while placing accountability and responsibility on the broadcasters and their self-regulating bodies."*

6. In **January 2020**, the Ministry of I and B had circulated a series of amendments to the Cable Act 1994 relating to various issues to update the provisions, but this has not yet been placed before Cabinet for approval and is apparently in cold storage.

## UPDATED INFORMATION TECHNOLOGY ACT?

- ❖ The **Information Technology (Intermediary Guidelines and Digital Media Ethics Code) Rules 2021** were notified on **February 25, 2021**.

The **key features** were as under:

- ◆ **Social media intermediaries**, with registered users in India above a notified threshold, have been classified as **significant social media intermediaries (SSMIs)**. *SSMIs are required to observe certain additional due diligence such as appointing certain personnel for compliance,*

*enabling identification of the first originator of the information on its platform under certain conditions, and using technology to identify specific content.*

- ◆ The **Rules** prescribe a framework for regulating content by online publishers of news and current affairs and curated audio-visual content.
- ◆ All intermediaries are required to provide a grievance redressal mechanism for resolving complaints from users or victims. A three-tier grievance redressal mechanism with varying levels of self-regulation has been prescribed for the publisher.
- ❖ Various High Courts have challenged specific provisions, especially by digital content companies and partial stay obtained. An essential criticism has been that the **Rules** go beyond the intent and purpose

of the **Information Technology Act**.

- ❖ **Four issues** that have been highlighted by critics are
  - ◆ The **rules** are beyond the **powers delegated** under the **Act** in some instances, such as regulating significant social media intermediaries and online publishers and requiring certain intermediaries to identify the first originator of the information.
  - ◆ Grounds for **restricting online content** are overbroad and may affect freedom of speech.
  - ◆ There are **no procedural safeguards** for requests by law enforcement agencies for information under the possession of intermediaries.
  - ◆ Requiring messaging services to enable the identification of the first originator of information on its platform may adversely affect the **privacy of individuals**.

## COMMENT

*In 2001 Government had planned to bring a mega Communications Convergence Bill who was intended to subsume five acts being*

- ❖ *The Indian Telegraph Act 1885.*
- ❖ *Indian Wireless Telegraphy Act 1933.*
- ❖ *The Telegraph Wires (Unlawful Possession) Act 1950.*
- ❖ *The Cable Television Act 1995.*
- ❖ *The Telecom Regulatory Act 1997.*

*The purpose was to promote the development of national infrastructure for an information-based society.*

- ❖ *To enable access thereto.*
- ❖ *To provide a choice of services to promote a plurality of news, views, and information.*
- ❖ *And to establish a regulatory framework for carriage and content of communication.*

*This did not go through Parliament approval and has been in cold storage for 20 years. A feeble attempt for revival was given up a couple of years back.*

*In the current converged era, this is a vital necessity. Still, there is no public demand nor the political will to bring about the much-needed Convergence Act.*



## LITIGATION

### CHALLENGE AGAINST NEW TARIFF ORDER: 2. Supreme Court



1. In **August 2021**, the Supreme Court *refused to stay* on Bombay High Court's order, which upheld most provisions of the **New Tariff Order (NTO)** issued by the **Telecom Regulatory Authority of India (Trai)** in **2017** and **2020**, which mandated individual pricing for television channels and recommended price caps.
2. Hearings are in progress in the Supreme Court. A significant development in **November 2021** during the **CII Big Picture** summit addressed by the new Secretary of Information and Broadcasting, **Mr Apurva Chandra**, announced the creation of a **Broadcast Seva Portal** to provide a **single point facility** delivering an efficient and transparent regime in the Broadcast Sector.
3. While there was no direct mention of the bitter complaints of the Broadcasters on what they describe as a negative impact of **NTO:2**, the new **TRAI** Chairman, **Dr P.D. Vaghela**, extolled the power of digital media and asked

the industry to ensure **100%** penetration of T.V. in India.

4. The Supreme Court has adjourned the final hearing on the Broadcaster appeals after TRAI *suo moto* postponed the date of implementation of **NTO:2** to **April 2022**.

5. *It would not be surprising to this writer if NTO:2 is watered down to mollify the Broadcasters.*

### I.T.INTERMEDIARY REGULATIONS CHALLENGED

1. Extending the **Information Technology Rules 2021** to **digital content providers** of all persuasions led to a spate of writ petitions in various courts in Delhi/Mumbai/ Chennai and other cities.
2. By order dated **14.08.2021**, the **Bombay High Court** stayed the operation of **sub-rules (1) and (3) of Rule 9**, holding that "*prima facie there is substance to the petitioner's grievance that an oversight mechanism to control the media by the Government may rob the media of its independence and the fourth pillar of democracy may not be there (at all).*"
3. In another similar writ filed in **Madras**, the High Court held that the **Bombay High Court** stay would have all India applicability and stayed the same provisions.

4. Looking at the multiplicity of petitions, a transfer petition has already been filed by the Government in Supreme Court, which has agreed to the transfer. Further proceedings will take place in early **2022** in the Supreme Court.

### ZEE-INVESCO DISPUTE



1. While **Zee** has successfully blocked the **EGM** requisition of **Invesco**, its principal shareholder, to hold an extraordinary general body meeting (**EGM**) to appoint new independent directors and the stepping down of the present Managing Director and CEO Mr Puneet Goenka by succeeding in the single Bench of the Bombay High Court, the Division Bench hearing will restart after the Xmas vacation. Meanwhile, **Zee** and **Sony** have announced their merger subject to statutory and Court approvals.
2. **Invesco** is still to comment on the merger. It had started earlier that *per se* it was not opposed to merger but had "concerns" on *corporate governance issues, financial irregularities, and related party transactions*. Clarity will emerge in the first quarter of **2022**.

## YES BANK-DISH TV DISPUTE

1. **Yes Bank** exercising its rights as a shareholder in **Dish T.V.** belonging to the **Essel/Goenka** family has been demanding a change of Board of directors on more or less similar terms as **Invesco** has been from **Zee**. The Bank owns a **25.63%** stake in **Dish TV India Ltd.**, making it the single largest shareholder. The shareholding resulted from the invocation of a **Promoter Pledge** in **May 2020**.

2. This led to a spate of countermeasures by **Dish T.V.** founders. On **November 30, 2021**, the Supreme Court, in a firm order, disapproved of the action of the U.P. Police freezing the shares of **Yes Bank** in **Dish T.V.** on very specious issues.

3. A Bench headed by Justice DY Chandrachud took severe exception to police action in a corporate matter and stayed the investigation until further orders.

◆ "We cannot permit police officers sitting in Gautam Buddha Nagar to freeze voting rights of a shareholder," the Bench said. "The police here did what even the **National Company Law Tribunal** did not do (freeze shares and voting rights)."

4. On **December 26, 2021**, the Delhi High stayed the order of the Debt Relief Tribunal Jaipur on a petition filed by **Greatway** and **Essel/Goenka** company. The Tribunal, in an interim

order, had directed a status quo on enforcement of rights arising from the shares held by the parties in the dispute—in short, freezing **Yes Bank's** voting rights in **Dish T.V.** The Tribunal then posted the case for hearing next on **December 29**—a day before the much-postponed **Dish TV AGM** is scheduled to be held. **Yes Bank** challenged the DRT's order in the **Delhi High Court**, arguing that the pledge on the



shares was created by **World Crest Advisors LLP** in favour of **Catalyst Trusteeship Ltd.** for **Yes Bank**. The High Court observed:

◆ "We are completely shocked and aghast to read the impugned order and the manner in which the presiding officer of the **DRT, Jaipur, Vivek Saxena**, has proceeded. Either he was ignorant of the aforesaid developments, for which the respondents are responsible, or he has exhibited a complete lack of judicial discipline."

5. The Bench noted that the proceedings before the DRT related to **Yes Bank's** taking over and attempted selling the Delhi property, which was mortgaged to the Bank.

◆ "We are at a complete loss to understand as to how

the respondents (**Greatway**) could have any interest in the pledged shares, which were not pledged by them, and as to how the tribunal could have passed an interim order in respect of the pledged shares," the Court added.

6. The **Delhi High Court** order also referred to earlier proceedings in the Bombay High Court, which is hearing a suit challenging **Yes Bank's** ownership of **Dish T.V.** shares.

7. In the suit filed against **Yes Bank** and **Catalyst Trusteeship** in Bombay High Court, **Dish T.V.'s** promoter entity **World Crest Advisors** has sought to declare that it is the valid owner of **44,00,54,852** equity shares **Dish T.V.**, which are currently held in the Bank's Demat account. In late December 2021, the Bombay High Court refused to grant any interim relief or a stay on **Yes Bank's** voting rights at the **Dish TV AGM**. But the Court said the AGM outcome will be subject to its final order in **World Crest's** suit. The matter will next be heard by the Court in **February 2022**.

8. Soon after that, the Mumbai bench of the **National Company Law Tribunal** also refused to freeze **Yes Bank's** voting rights for the forthcoming AGM on December 30, 2021, when approached by a group of Dish T.V. shareholders. The **Tribunal** will hear the matter next on **January 4**.

## COMMENT

*The bitter battle of the Goenka group in the Dish T.V. dispute has been accompanied by radio silence from both the Government and SEBI. Perhaps political affinities do have a role, but this is an unedifying spectacle that is best quickly resolved. As corporate governance issues are critical issues, in this case, there is some doubt whether these issues will be resolved before completing the Zee-Sony merger sometime at the end of 2022.*

## ADDITIONAL NOTE

1. The Annual General Body meeting of Dish TV was held on **30.12.2021**. No stay was granted by the Bombay High Court by its order dated **23.12.2021** filed by a **Essel/Goenka** Group company **World Crest Advisors** nor any direction was apparently given to submit the voting results to the Bombay High Court.
2. Even so **Dish TV** has informed the stock exchanges on 30.12.2021 that it will submit the outcome of the three resolutions to the Bombay High Court in line with what the company claims was the court's earlier order.
  - ◆ "By way of an order dated **23 December 2021** in the Suit, the Hon'ble High Court of Bombay was pleased to direct that the voting results/outcome of the **AGM** scheduled to be held on **30 December 2021** shall abide by the final decision in the Interim Application," **Dish TV** said in a filing to the exchanges.
  - ◆ "In order to comply...the Company had requested the Scrutinizer to place all the information relating to the e-voting, along with his Report, in **a sealed cover** and hand the same over to the Company Secretary & Compliance Officer of the Company, who shall in turn place the same before the Hon'ble Bombay High Court for further directions," **Dish TV** told the exchanges.
3. This is yet another delaying tactic by **Dish TV** promoters to deny significant shareholders rights of **Yes Bank**. What is shocking to this writer is that the strong comments of the Supreme Court in an appeal filed by **Yes Bank** against the **UP Police** in a related matter has not chastened the **Dish TV** promoters or changed the legal stratagems adopted by the Promoters to delay the inevitable. More on this will be heard in the Bombay High Court and Supreme Court in early **2022**. ■



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# SONY AND ZEE SIGN DEFINITIVE AGREEMENTS TO MERGE

*Combined Company to Deliver Premium Content with a Robust Consumer Experience across Platforms*  
*Synergies between SPNI & ZEEL to enhance the Combined Company's Content Creation Capabilities and Drive Digital Platform Growth*

Sony Pictures Networks India Private Limited (SPNI) and Zee Entertainment Enterprises Ltd. (ZEEL) announced that they have signed definitive agreements to merge ZEEL with and into SPNI and combine their linear networks, digital assets, production operations and program libraries. The agreements follow the conclusion of an exclusive negotiation period during which ZEEL and SPNI conducted mutual due diligence. After closing, the new combined company will be publicly listed in India. The closing of the transaction is subject to certain customary closing conditions, including regulatory, shareholder, and third-party approvals.

Under the terms of the definitive agreements, SPNI will have cash balance of USD \$1.5 Bn (assuming an INR:USD exchange rate of 75:1) at closing, including through infusion by the current shareholders of SPNI and the promoters (founders) of ZEEL, to enable the combined company to drive sharper content creation across platforms, strengthen its footprint in the rapidly evolving digital ecosystem, bid for media rights in the fast-growing sports landscape and pursue other growth opportunities.



SPNI is an indirect subsidiary of Sony Pictures Entertainment Inc. (SPE). Under the transactions contemplated by a non-compete agreement, SPE, through a subsidiary, will pay a non-compete fee to certain promoters (founders) of ZEEL, which will be used by such promoters (founders) to infuse primary equity capital into SPNI, entitling the promoters (founders) of ZEEL to acquire shares of SPNI, which would eventually equal approximately 2.11% of the shares of the combined company on a post-closing basis. After the closing, SPE will indirectly hold a majority 50.86% of the combined company, the promoters (founders) of ZEEL will hold 3.99%, and the other ZEEL shareholders will hold a 45.15% stake.

Mr. Punit Goenka will lead the combined company as its Managing Director & CEO. The majority of the board of directors of the combined company will be nominated by the Sony Group and will include the current SPNI Managing Director and CEO, Mr. N.P. Singh. On closing, Mr. Singh will assume a broader executive position at SPE as Chairman, Sony Pictures India (a division of SPE) reporting to Mr. Ravi Ahuja, SPE's Chairman of Global Television Studios and SPE Corporate Development.

The combination of ZEEL and SPNI is expected to achieve business synergies and given their relative strengths in scripted, factual and sports programming, respective distribution footprints across India

and iconic entertainment brands, the combined company should be well-positioned to meet the growing consumer demand for premium content across entertainment touchpoints and platforms. The seamless blend of rich expertise in content creation, deep consumer insights and success across entertainment genres is expected to drive the combined company's ability to accrue higher shareholder value. Under the stewardship of the Sony Group, a global leader in consumer technologies, gaming and entertainment, the combined company is expected to be able to better compete with the world's largest streaming players.

As part of the definitive agreements, the promoters (founders) of ZEEL have agreed to limit the equity that they may own in the combined company to 20% of its outstanding shares. This construct does not provide the promoters (founders) of ZEEL any pre-emptive or other rights to acquire equity of the combined company from the Sony Group, the combined company or any other party. Any shares purchased by the promoters (founders) of ZEEL, must be in compliance with all applicable laws including any pricing guidelines.

Commenting on this development, Mr. Punit Goenka, MD & CEO, ZEE Entertainment Enterprises Ltd. said, "It is a significant milestone for all of us, as two leading media & entertainment companies join hands to drive the next era of entertainment filled with immense opportunities. The combined company will create a comprehensive entertainment business, enabling us to serve our consumers with wider content choices across platforms. I am immensely grateful to the teams at ZEEL, SPE and SPNI for their efforts, that swiftly led us to this point within the stipulated timelines. This merger presents a

significant opportunity to jointly take the businesses to the next level and drive substantial growth in the global arena. I look forward to working with the guidance of the esteemed members of the combined company's board to unlock the potential of this merger, and I wish N.P. Singh all the best in his new role at SPE. His contribution to the Indian media & entertainment industry has been invaluable. I am most certain that our collective wisdom, rich experience and expertise will lead to a more value accretive and exciting company for our shareholders and employees, and a more engaging one for our customers and partners."

"Today marks an important step in our efforts to bring together some of the strongest leadership teams, content creators, and film libraries in the media business to create extraordinary entertainment and value for Indian consumers," said Mr. Ravi Ahuja, SPE's Chairman of Global Television Studios and SPE Corporate Development. "I want to thank Punit and his team at ZEEL and the small army of people at SPE and SPNI who have worked so hard to get us to this point.

I especially want to thank N.P. Singh, who presented us with the idea to explore this merger well over a year ago. N.P. has done extraordinary work building SPNI to what it is today, and we look forward to continuing our work with him in his new role after closing."

MD & CEO, SPNI, Mr. N.P. Singh, added, "This merger will create a company that's best in class and will redefine the contours of the media and entertainment industry. As a representative of SPE on the Board of the new merged company, it will be my endeavour to provide strategic guidance and support to the company's operating team in achieving our vision. I am also excited at the opportunity of being

appointed, Chairman, Sony Pictures India, to oversee SPE's investments and craft a wider footprint for Sony in India."

SPE was advised on this transaction by Morgan Stanley, KPMG Corporate Finance, and Shardul Amarchand Mangaldas & Co. ZEEL was advised by KPMG, JP Morgan, Trilegal and Boston Consulting Group.

### **About Sony Pictures Networks India (SPNI):**

Sony Pictures Networks India is an indirect wholly owned subsidiary of Sony Group Corporation, Japan. SPNI has several channels including Sony Entertainment Television (SET and SET HD), one of India's leading Hindi general entertainment television channels; SonyLIV - the digital entertainment VOD platform; and Studio NEXT the independent production venture for original content and IPs for TV and digital media. SPNI reaches out to over 700 million viewers in India and is available in 167 countries.

### **About ZEE Entertainment Enterprises Ltd (ZEEL):**

Zee Entertainment Enterprises Ltd. is a media & entertainment powerhouse offering entertainment content to diverse audiences. With a presence in over 190+ countries and a reach of more than 1.3 billion people around the globe, ZEEL is among the largest global content companies across genres, languages, and platforms. ZEEL is present across broadcasting, movies, music, digital, live entertainment, and theatre businesses, both within India and overseas with more than 260,000 hours of television content and the world's largest Hindi film library with rights to more than 4,800 movie titles across various languages. ZEEL has also produced several movies for theatrical release and is the fastest growing music label in India. ■

# CONTENT STUDIO VENTURE SET UP FOR US\$ 150 MN

Indian content is going places and attracting investment across the globe. In a major initiative Abhishek Vyas, former director of Netflix India, has joined hands with the Royal Family of UAE to launch a content studio that will invest over \$150 million in films and web series.

"We are launching this studio, AVS Filmworks, in Dubai, in partnership with the Royal Office of HH Sheikh Ahmed Bin Faisal Al Qassimi. As a part of this collaboration, we will invest about \$150 million in the Indian content business," Vyas said. "We will be producing content across Indian languages and this collaboration, we will invest about \$150 million in the Indian content business,"

Vyas said. "We will be producing content across Indian languages and this joint venture is focused on bringing top notch stories and talent to the Indian audience and Indie cine lovers across the world."

Vyas joined Netflix in May last year. Prior to that, he was head producer at Zee Studios and senior producer at Eros International. He has also worked at Network18 and Star India previously.



**HH SHEIKH AHMED BIN FAISAL AL-QASSIMI with ABHISHEK VYAS**

I have had the opportunity to be deeply entrenched in the Indian film industry, having worked with some of the leading studios and OTTs in the country. The experience has allowed me to be in the middle of the filmmaking process, right from the idea to its release. With this new venture, I shift gears as move to becoming an independent film producer," he said.

While Vyas has already started scouting for stories, he said details on the first set of projects will be announced next month.

"I have personally been a fan of Indian films and we are so happy

to get into this collaboration with Abhishek and totally support his vision. We hope to bring the best stories to the audience in the near future," said Salwa Abdul Aziz Zein, CEO at the private office of HH Sheikh Ahmed Bin Faisal Al-Qassimi.

Tomaz Zaleski, chairman of the Royal Office, added, "We are pleased to partner with AVS Filmworks, wherein we will be jointly producing Indian cinemas in different languages. We have signed a partnership agreement and will be announcing our projects by mid-January 2022." ■



# THE 2022 NAB SHOW® AND WHAT ITS REIMAGINED EXPERIENCE MEANS FOR YOU

*By now you've probably heard that you can expect something new and different at the 2022 NAB Show, slated for April 23–27 in Las Vegas. In this Q&A, NAB Show SVP of Business Development Eric Trabb shares his perspective on the reimagined NAB Show experience and what you can expect on the show floor in 2022.*



*“Walk onto the show floor, and you’ll find we’ve curated the journey for you. The show is organized around three pillars of the content life cycle — Create, Connect and Capitalize — and the Inspiration, Innovation and Implementation experience zones within each of those areas.”*

**ERIC TRABB, NAB Show  
SVP of Business Development**

**Q:** *NAB Show has been working on a reimagined experience for the 2022 show in Las Vegas. What will this mean for show attendees?*

**A:** Ultimately, it means that whether you’re a broadcaster, cinematographer, streamer or podcaster — really anyone involved in creating content, connecting with audiences or capitalizing on that content through monetization — you can find all the tools you need to do your work, all at the 2022 NAB Show. You can make the most of your time and get more out of the experience too.

Because the new event design is built around real-world applications and workflows, you can easily navigate your way to the right solution, the right vendor, the right contact. You’ll also discover, right on the show floor, experience zones that bring products, technologies and workflows to life. Focusing on inspiration, innovation and implementation, these zones will give you a clearer sense of the big picture, new directions and

opportunities within the industry, and the tools and technologies you can use to move ahead, whether with a new project or a new phase in your career.

Walk onto the show floor, and you’ll find we’ve curated the journey for you. The show is organized around three pillars of the content life cycle — Create, Connect and Capitalize — and the Inspiration, Innovation and Implementation experience zones within each of those areas. We’ve added complementary activities and resources that align with each pillar, making it easier for you to learn in your interest area, to network with like-minded people and to find the new products you need.

**Q:** *Why overhaul the long-familiar NAB Show model, and why now?*

**A:** Rapid, ongoing change — and particularly convergence across different areas of the media industry — over recent years has transformed the way media is created, managed, distributed, consumed and monetized.

We've seen this change happening. We've also spent a lot of time seeking input from attendees and exhibitors from various communities about their needs and how the NAB Show can better facilitate networking, discovery and education.

The old model, with a radio hall, a broadcast hall, a film hall and so on, simply doesn't apply to today's media ecosystem. Building on expertise gained over decades producing a vital industry trade show and on extensive feedback gathered over the past year and a half, the reimagined 2022 NAB Show offers a new and different experience. That's going to be true whether you've been attending for 25 years or you're going to your very first show.

The reimagined NAB Show experience accounts for the fact that we live and work in a cross-platform world. High-end professional products and technologies previously within reach only for larger companies have become more accessible to smaller businesses, and those tools are no longer confined to different silos within the industry. The 2022 NAB Show design makes it easier for exhibitors to showcase their innovations and recent product development for this much broader audience. Attendees will find it easier to find and learn about tools and solutions that support their work.

**Q. *Given all this change, who should attend the 2022 NAB Show and why?***

**A:** The 2022 NAB Show is unique in addressing the full scope of the modern media industry while also guiding attendees towards the tools and expertise appropriate to their niche within that industry.

If you're someone who started up a podcast during the pandemic or built-up a following on Instagram, YouTube or TikTok, the show will not

only help you find that camera or mic you've been needing, but also help you to see future possibilities for your work and your career. Maybe you know media is your future. Or maybe you're not sure. The 2022 NAB Show is the perfect place to explore your options. You can delve into educational and inspirational programs in your interest area, or stop by a social event to exchange ideas with other people working in the same space. So often, meetings at the show lead to lifelong connections with colleagues — and a larger professional network — that help catapult a small business toward further success.

If you're a longtime NAB Show attendee with an extensive history in broadcast or film, the 2022 NAB Show gives you the opportunity to reconnect with friends and colleagues, to see the latest best-in-class products implemented as part of modern, real-world workflows, and to learn more about what industry convergence means for you and your business.

In fact, the 2022 NAB Show will feature a brand-new showcase dedicated to one of the most notable areas of change across the media industry. The new Intelligent Content showcase will explore the ways in which data, artificial intelligence, and automation are influencing the full content life cycle, from the way content is created and managed to the manner in which it is delivered, consumed and monetized.

The 2022 NAB Show is where you'll find the people, technologies and inspiration that will help your business adapt and thrive going forward, and it delivers these benefits within a much richer experience — one tailored to provide fresh opportunities for learning, discovery and engagement.

**Q. *If I'm an exhibitor at the 2022 NAB Show, how does the new approach benefit me?***

**A:** One of the biggest changes in 2022 is that we're really bringing the applications and action to the show floor. In creating this experience, we make it easier for attendees to lock onto the workflows and solutions of interest to them. At the same time, we're delivering real, measurable value for exhibitors. We're helping to drive the right person to their booth so that there is alignment on both sides. We're also expanding the ways in which exhibitors can showcase their products and technologies.

Through the experiential zones associated with each content life cycle pillar — Create, Connect and Capitalize — exhibitors gain added opportunity to highlight their solutions. While exhibitors might take advantage of the "Inspiration" theater within their pillar area to demonstrate a new innovation or present a case study, they can also reach beyond their core area with a presentation, networking event or other educational program in the Inspiration, Innovation or Implementation zone of another pillar area. This is a great way to feature a new or expanded use case for established solutions — and to boost overall awareness of your brand and product offering in the process.

**Q. *Any words of advice for first-time attendees?***

**A:** You don't have to be an NAB Show alum, or even consider yourself part of the media industry, to go to the 2022 NAB Show and find valuable information, contacts and solutions. If you're even thinking about coming into the industry, it's a fantastic resource. In past years the whole experience might have been a bit overwhelming. When you go to the 2022 NAB Show, though, you can let your interests and curiosity be your guide. And, if you're a content creator of any kind, you're already part of the NAB Show community. ■

# VIACOM18'S SONIC CELEBRATES 10 YEARS OF ENTERTAINING KIDS

*Played a significant role in strengthening leadership for the Nickelodeon franchise*

It was on December 19, 2011 that Sonic, part of India's leading kids' entertainment franchise Nickelodeon, went live. Entering an already cluttered and competitive market, Sonic since inception has engaged and entertained kids with stories that bring happiness in their lives. Starting from the bottom of the charts during its initial years, the channel has grown to become an entertainment hub and continues to rule the hearts and minds of its young viewers, as it turns 10.

Rising through the ranks, the kids' category has witnessed Sonic's journey from 7th position since its launch a decade ago to the 3rd position in 2020-21 and currently a strong No. 1 in its anniversary week. With a splendid reach of 28.2 million as of November 2021, Sonic plays a significant role in strengthening leadership for the Nickelodeon franchise. With viewers spending 119 minutes on an average per week, Sonic currently commands 13% market share. From the launch of its first show 'Kung Fu Panda- The Legend of Awesomeness' to its latest home-grown IP Pinaki & Happy - The Bhoot



Bandhus, the show contributes 30% of the channels ratings and consistently appears in the category's Top 10 slots since its launch. Sonic has crafted and carved its growth story upon engaging stories, endearing characters and a solid kids connect.

Speaking on Sonic's journey over the last decade, Nina Jaipuria,

Head of Hindi Mass Entertainment & Kids TV Network, Viacom18, said, "When we started our journey with Sonic a decade ago, we took a plunge in the highly competitive kids category. From then to now, Sonic has grown leaps and bounds. The success story of Sonic is a result of our kids first approach in driving innovation with pioneering homegrown content thus making Nickelodeon the leading franchise. We take great pride in Sonic's success and are truly overwhelmed with the love it continues to receive from kids and advertisers alike. We are happy to have built a brand that is a destination that kids return to for their daily dose of entertainment and look forward to the next phase with enthusiasm and zeal."

Commemorating Sonic's decade long journey, a special birthday campaign 'Tenniversary' is devised focusing on partnerships, expansive influencer promotions and digital engagement through an array of exciting activities that is sure to keep children entertained. ■



# 3SS AND CINEMO TO ENABLE SUPERIOR IN-CAR ENTERTAINMENT EXPERIENCES

*World-renowned in-car connectivity and infotainment leader Cinemo collaborates with globally recognized TV user experience experts 3SS to enable advanced in-car entertainment*

3 Screen Solutions - 3SS a leading provider of software solutions for multiscreen entertainment, and Cinemo, a global leader in automotive infotainment middleware, today announce their technology collaboration which will bring advanced digital entertainment to cars.

Cinemo is a pioneer and established leader in the arena of in-vehicle infotainment and connectivity. The company is renowned for technology innovation and expertise, its automotive solutions having been adopted by numerous leading car manufacturers.

3SS is an acknowledged enabler of advanced TV entertainment user experiences (UX). Pay-TV operators around the world, with a combined reach of over 35 million homes, have deployed 3SS technology to deliver seamless experiences to subscribers across a wide array of devices and screens. Meanwhile, these service providers benefit from streamlined, real-time cross-device UX management and content curation.



3SS is sharing its vision of how in-car entertainment, powered by 3SS' 3Ready Product Framework, could look in what Tomasz Dzikowski, Product Owner Automotive at 3SS, describes as, "the third living space". The showcase demonstrates how car makers and service providers can differentiate by providing exceptional in-vehicle UX, featuring next-level content discovery and sharing in the car. The solution is due to have its worldwide debut at CES 2022, Las Vegas, Jan. 5-8, 2022, in a demo to feature popular children's service TOGGO from SUPER RTL, Germany's leading provider of kids TV programming, and multi-player games from leading provider AirConsole.

## Extending Entertainment Everywhere

Mobility in vehicles no longer means passive. Car interiors are being redesigned to give more space and attention not only to the driver, but the other occupants as well. Bigger, higher-quality screens and faster connectivity are accelerating that trend.

3SS views automotive as a natural expansion of its enduring commitment to help operators deliver seamless UX across all screens. Dzikowski explains: "We know from the new paradigms of autonomous driving, electrification and today's dynamic in-vehicle infotainment ecosystem, that soon screens in cars will be augmentations to the long-established entertainment everywhere concept."

The benefits of the new solution for in-car entertainment are myriad: It brings the much-loved content super-aggregation experience to the car, with passengers able to access a rich array of pre-integrated third-party content and apps. Enhanced content discovery and aggregation means that everyone in the car gets personalized entertainment,

from video streaming to in-car gaming. Multi-screen video synchronization and sharing are enabled: As a result, passengers can either watch or play together or independently throughout the journey. Furthermore, this diverse content offering can be efficiently enhanced and adapted in real-time via a remote management platform.

“Gradually, consumers will have more free time in the car,” explains 3SS’ Dzikowski. “They can decide boost their productivity by catching up with the news or doing work, or they can simply enjoy the moment, relax and watch content, make video phone calls or play games.”

“Critically, next-level in-car entertainment must be seamless and integrated with the living room experience, while adding new flavor with the vehicle’s specific ecosystem and environment context. It’s an exciting new area to explore, together,” he adds.

“TOGGO has long been committed to bringing top-quality content to children, and to understanding their needs, wherever and whenever they’re watching: It’s a core value for us,” says Robert Dube, SUPER RTL’s Head of Product & Data TOGGO Digital.

“We created TOGGO to be 100% just for kids,” Dube adds. “We are excited to now explore how to bring the best kids viewing experience from mobile, web and TV directly into the rear-seats of cars,” Dube added.

### **3SS is widely acclaimed in its field**

Multiscreen TV services and innovations enabled by 3SS, powered by trusted 3Ready User Experience, have won over 18 industry awards. These accolades span Connected TV Awards, CSI Awards, VideoTech Innovation Awards and Red Dot Design Innovation Awards, among others.

In the last three years alone, multiscreen TV projects delivered by 3SS have been acclaimed with “Best TV User Experience” awards no fewer than four times, the most recent occasion in December 2021.

### **Real-time in-car experience optimization and curation**

The 3Ready Control Center, part of the 3Ready Product Framework, is the key to enabling the UX flexibility and management capability that bring this new in-car entertainment experience to life. The user experience can be managed and targeted dynamically, in real-time, with capability for application and content curation. The result is superior viewing enjoyment for the user and operational efficiencies for the service provider.

The Cinemo Play Anywhere solution redefines the infotainment experience in the car and puts all passengers in the media driving seat, delivering any app from the automotive play store, with synchronized visual content on multiple displays.

In July 2021, Cinemo Play Anywhere was selected for the esteemed ABC Award The World of Mobility, by the German Design Council in the Automotive Brand Contest 2021. As the leading mobility award, the ABC Awards uniquely celebrate forward thinking, future-oriented designs and ground-breaking technical development.

This technology collaboration will benefit telcos and other service providers as well as their customers: “Operators are key to providing these seamless experiences everywhere, as well as enabling the connectivity to power it,” Says Pierre Donath, 3SS CPO & CMO.

“Furthermore, telcos and video service providers are eager to seize this opportunity to build even stronger, wider-reaching subscriber relationships,” he adds.

“Cinemo solutions are deployed in millions of automobiles worldwide; as such, its established APIs and technology solutions are trusted by car makers. Using Cinemo’s products and technologies, we look forward to bringing the same high-quality experience consumers enjoy on the sofa at home or on their favorite mobile devices to vehicles,” added Donath.

### **About 3 Screen Solutions (3SS)**

3SS delivers experiences people love, enabling leading-edge entertainment services with harmonious UX across all screens. Together with our customers, we create services which are simple to use and personal. Our way of working is agile, open and collaborative; we aim to be the best partner to co-create seamless experiences.

Established in 2009, 3SS is an acknowledged leader in system integration, app development, UI/UX design innovation and solution architecture. We created 3Ready, the world’s leading Entertainment Ecosystem to launch seamless experiences on across all screens, co-create and enable customer-centric innovation. The 3Ready Entertainment Ecosystem counts 17 operators powered by our Product Framework and 85+ industry-leading partners to date.

Customers include major operators worldwide including A1 Telecom Austria Group, Swisscom, Tele2, Allente, Proximus, TCC Uruguay, FreeCast, Elisa Estonia, Altibox, ORS, Yes, Vodafone, Norlys, Liberty Global, SES, Eutelsat, and O2/Telefonica. Broadcast customers include ProSiebenSat.1, Joyn (ProSiebenSat.1/Discovery), SUPER RTL (TOGGO), n-tv, Blockbuster and Viacom, among others. We are creating the future of entertainment. ■

# PFT DELIVERS AI-LED AUTOMATION OF SEGMENTATION WORKFLOWS TO ITV

*ITV has engaged Prime Focus Technologies for delivering AI-based automatic segmentation of long-form content.*

Prime Focus Technologies (PFT) is pleased to announce that its AI/ML-powered native media recognition engine CLEAR® Vision Cloud has been engaged by ITV, the oldest and largest commercial terrestrial television network in the United Kingdom for delivering AI-based automatic segmentation of long-form content.

ITV currently marks about 12 types of segments in the content manually, which are both physical segments like color bars, blacks, and slates, and creative segments like recaps, PRTS, credits, program part segments, and bumpers.

ITV wanted to leverage AI/ML technologies to mark the segments at 95-100% accuracy followed by human QC, and complete the entire process in about 3 minutes instead of the 15-20 minutes it takes currently when performed manually.

PFT showcased CLEAR Vision Cloud and its AI-led Basic Metadata

Data Pack and AI-assisted Segmentation Toolkit to ITV. When deployed, the data pack ensures near 100% accuracy and frame accuracy, and 100% automation of workflows to extract the content segments. With the segmentation toolkit, M&E organizations can review and QC

projects, ITV was convinced,” said Nick Kaimakami, EVP & Head – EMEA and USA East. “CLEAR Vision Cloud will bring about a substantial reduction in time and cost of segment marking and content segment extraction for ITV.”

ITV has deployed the CLEAR Vision Cloud, which automatically picks up the content and runs its sophisticated AI engines to mark the segments with near 100% detection accuracy and 95-98% frame accuracy, even in creative segments. Since CLEAR Vision Cloud is hosted on the cloud, it can auto-

scale on demand and handle elastic loads at minimal costs while ensuring high performance always.

The AI-led segmentation toolkit that ITV operators will use has been custom-made by PFT specifically to ensure high performance at peak load and very low manual review time. PFT worked jointly and directly with the



automatically identified segments, filter out content segments and export EDLs, and generate a video of the custom segment, stripping out the rest of the physical segments.

“When we demonstrated CLEAR Vision Cloud and especially our segmentation use case perfected in-house by the Digital Media Services team delivering numerous client facing



operators, architects and engineering teams inside ITV to learn the process and tune its AI engines to deliver the outcomes. A Segmentation proof of concept (POC) was done jointly and the accuracy was tuned up to the required level so that a QC could be done in less than 3 minutes.

"I am very impressed with CLEAR Vision Cloud and PFT's approach to making AI work for us," said Sonny Hanley, Controller of Content Services, ITV. "PFT understands that each media enterprise is unique both in terms of business objectives and nature of content, and hence the AI solution cannot have a 'one size fits all' approach. Their AI experts worked with our teams to understand the challenges and deliver a solution that truly meets the efficiency goals we had envisaged when we commissioned this project."

A truly novel industry-first feature of CLEAR Vision Cloud is that when a content segment or its signature is not identified by its AI engine and is marked manually during QC, it automatically triggers learning for Vision Cloud's Machine Wisdom. This automatic learning through QC input ensures errors are never

repeated and frame accuracy improves every time. Machine Wisdom is like the human brain, constantly learning and applying those in context to deliver improved outcomes for the customer.

### About ITV

ITV connects millions of people every day, making content they can't get enough of, and reflecting and shaping the world we live in... and we do all this through the power of creativity.

We are a leading media and entertainment company, with the largest free-to-air commercial television network in the UK, a global production and distribution business and a growing Direct to Consumer business. Engaging audiences in the UK and around the world with creative, high-quality content is at the core of everything we do.

We reach over 40 million viewers every week with our programmes on ITV's family of channels, as well as through ITV Hub.

ITV has several SVOD services with over 3 million subscribers worldwide, including BritBox UK, BritBox International which is available in the US, Canada, Australia, and South

Africa and will soon be available in The Nordics, and ITV Hub+ (the ad-free version of the ITV Hub with download functionality).

### About Prime Focus Technologies

Prime Focus Technologies (PFT) is the creator of Enterprise Resource Planning (ERP) software, CLEAR® for the Media & Entertainment (M&E) industry. It offers broadcasters, studios, brands and service providers transformational solutions that help them lower their Total Cost of Operations (TCOP) by automating business processes around content and managing their business of content better.

PFT works with major M&E companies like Warner Media, PBS, Walt Disney-owned Star TV, Hearst, Channel 4, CBS Television Studios, 20th Century Fox Television Studios, Lionsgate, Showtime, HBO, IFC Films, TERN International, Sony Music, Google, YouTube, Disney+ Hotstar, Amazon, Viacom's Voot, Cricket Australia, BCCI and Indian Premier League.

PFT is the technology subsidiary of Prime Focus, the global leader in M&E industry services. ■



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# NEUMANN COLLABORATES WITH CHORDFATHER PRODUCTIONS FOR NEUMANN DOLBY ATMOS MUSIC MIX SETUP AT MUMBAI

*Exclusive Experience & Listening sessions for Business partners/Industry professionals only*



Extending industry professionals and audio experts a reason to cherish, Neumann in collaboration with Chordfather productions announced the launch of its exclusive Studio Monitor Experience center for audio professionals in Mumbai. India is one of the few countries worldwide to have

a Neumann Monitors experience center and additional zones will follow in near future across India.

In a quaint neighborhood of Mumbai, India, is situated a cozy place where magic happens! Built with love and designed with a vision, Sunny M.R.'s Chordfather Productions speaks volumes of his passion for fast

paced technology while being deeply connected to essence of eternal experimentation, which incidentally is one of the first few in the country to proudly boast of a Neumann collaboration.

Chordfather Productions caters to a whole wide gamut of professionals, creating and delivering high end content spanning across various platforms. Being the first ones across the country, the Neumann experience at Chordfather Productions consists of a Dolby Atmos Music Mix Room with 7.1.4 configuration and Two Stereo rooms for Music Production, Mixing and Mastering for Bollywood Films and Indie Music Artistes. The mixing room is professionally calibrated for optimum clarity and frequency response for industry standard music production, monitoring, mixing and mastering services.

Sharing his excitement on the collaboration for the Neumann experience at Chordfather Productions, **Mr. Vipin Pungalía, Country Manager, Sennheiser Electronics India** said, "Neumann defines standards for microphone and audio

culture since 1928. To understand that we do the same for monitoring, you need to hear the difference from what you considered “very good” up until now. We see the overwhelming interest in the industry. Monitoring is not something you can experience on a website or a tech sheet.”

He further added, “We want business professionals to have a first-hand, a first-ear experience on the potential that comes with the KH models. Their reputation is already incomparable when it comes to precision, neutrality, and overall system integration options. Nonetheless: how much this eases your sessions, prevents acoustic fatigue, and allows for a new level of control and fidelity on your sound stage must be experienced. We want to bring experience rooms as close as possible to industry professionals so everyone can have an informed decision on the best possible audio”.

Speaking on the collaboration **Sunny M.R. owner at Chordfather production** said, “I am thrilled to partner with Neumann for my Music Production Facility enabled with Dolby Atmos Music Mixing. The partnership



**SENNHEISER**

is aimed at building a community for artistes striving to get their musical work done. We give a huge amount of credit to the quality and finesse that Neumann gears add to the sound. The idea is to make more and more music in an environment, which is loved by artistes alike.”

Chordfather Productions houses the most cutting-edge technology and an arsenal of various Analog gear. The Atmos Music monitoring setup has 11 of KH 310 speakers and Dual KH 810 Subwoofers, driving the space that is closest to his heart, which is filled with every variety of synths that are his prized possessions. Given the experience and expertise in the music industry, Sunny M.R.’s admiration for Neumann equipment has only grown over the years. Chordfather Studio is a Haven for the old as well as new and upcoming artists who can come together and form a beautiful community of like-minded

music professionals and admirers alike.

#### About Neumann:

Neumann is a reputed brand Globally and in India. Known for its stride in innovation in the professional audio space. Neumann monitors include solutions for all room sizes, working ranges, mounting options, networking standards

and even most demanding industry specifications. Analog and DSP options are included, as well as unparalleled subwoofer technology. One of the latest additions to the series is an automatic alignment/room calibration kit, jointly developed with the leading audio experts from Fraunhofer Institute.

#### About Chordfather Productions:

Equipped with latest tech and an arsenal of gear, Chordfather Productions is a collective aimed at creating, planning, producing, and delivering music and related content spanning across various platforms with excellence. From Composing to Music production, Mixing, Mastering and Mixing in Dolby Atmos, it’s a one of kind, one stop solution for all musical works. A brainchild of Sunny M.R. the facility is aimed at creating a community for artistes and music! ■



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# SANGLI POWERS AHEAD WITH SYNAMEDIA'S VIDEO SOLUTIONS AS IT EYES EXPANSION IN INDIA

Synamedia, the world's largest independent video software provider, announced that Sangli Media Communication, the largest independent cable company (MSO) in Sangli Maharashtra, India, has deployed Synamedia's video network solutions as it adds services and grows its business. Synamedia's technology is allowing Sangli Media to increase the number of channels it delivers to local cable operators while reducing bandwidth. It also improves video quality resulting in an enhanced viewing experience to 1.4 million subscribers.

Using Synamedia's Converged Headend solution, Sangli Media has added over 100 new HD channels and upgraded 475 existing channels, boosting its competitive advantage without increasing costs, thanks to the improved efficiency provided by Synamedia VIVID compression. As Sangli Media looks to expand to audiences beyond western Maharashtra, its ability to now easily and quickly launch new services with minimal investment ensures Sangli Media's service is an

attractive platform for broadcasters to deliver their channels while providing more value to subscribers.

Going live with Converged Headend, powered by the Virtual Digital Content Manager (vDCM) featuring industry-leading compression and statistical multiplexing, Sangli Media has been able to improve video quality and add

support the launch of new OTT services. Other features that made Synamedia's offering compelling include the ability to offer scroll on-screen display messaging - a regulatory requirement for character support for all local Indian languages - as well as automatic loudness control and high-capacity multiplex scrambling.

Mr. Madhav Betgeri, Managing Partner at Sangli Media Communication, said, "As a technology partner, Synamedia has gone beyond our expectations and



channels without having to invest in upgrades to the connectivity between local cable operators and the last mile. This reduces operational complexity, capital investment and minimizes risk. Importantly, it also accelerates the time to market for new channels and services.

One important factor influencing Sangli Media's decision was Synamedia's flexible licensing model which allows Sangli Media to upgrade to more efficient codecs when they become available, and to

helped us build a technology platform that is cost-effective, efficient and future-proofed. In addition to rolling out new services, we have bold plans to expand the areas we serve and, with Synamedia's technology, we know we are well positioned to accomplish our goals. Thank you to our partners whose professionalism and vision played an important role in bringing this to life: Mr. Dhananjay Mahadik, Mr. Nagesh Chabria, Mr. Dhanesh Shete, Mr. Manoj Bhurat, Mr. N M Bhokare, and Mr. Harish Gulabani."

Mr. Khushvant Kundi, head

of Video Network Sales in Asia Pacific at Synamedia, said “Thanks to the deployment of end-to-end Synamedia video network solutions, Sangli Media can now launch compelling services at scale and deliver quality video viewing experiences that will help maintain its competitive advantage. We look forward to Sangli Media accelerating its business growth now that it has the latest technology in place.”

Synamedia VDCM includes encoding, transcoding, statistical multiplexing, scrambling, DRM, packaging and advertising capabilities in a single solution. A microservices based architecture, it offers the flexibility of deployment using private, public or hybrid cloud. Sangli Media is also using Synamedia Video Services Manager

(VSM) to provision and manage on-premise DCM instances.

Synamedia’s video network portfolio powers premium quality broadcast and broadband video for more than 1,000 operators worldwide and 100 million daily viewers. Its video distribution, processing and delivery services and solutions create compelling live multi-screen experiences, enable software-defined video processing and unify operations. The award-winning portfolio also features cloud-native portable video workflows, converged broadcast and broadband end-to-end ATSC 3.0 offering and low latency solutions for live video. Its Virtual DCM features live transcoding to multiple bit rates and formats, scalable video functions and best-in-class video

quality all aimed to deliver infinite entertainment.

### About Synamedia

Synamedia is trusted by over 200 video service providers to deliver, protect and monetize video content in an increasingly IP world. Synamedia’s flexible incremental architecture provides a rapid, friction-free way to add, build and deploy cloud-based video services. Our award-winning portfolio also includes intelligence-led anti-piracy, advanced advertising, business analytics, broadband, and video network solutions and services. Synamedia’s technology is in 320 million active devices and protects \$70 billion in revenue annually. Synamedia is backed by the Permira funds and Sky. ■




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# NUGEN AUDIO PROVES ESSENTIAL TO RICH AITKEN'S TV, FILM AND GAME SOUND MIXING

*Brand's Paragon Reverb and VisLM Loudness Plug-ins Offer Consistency to Projects at Home at Nimrod Sound as Well as on the Road at High-Profile Studios*

Bassist turned Scoring Mixer Rich Aitken has been one of the industry's most respected sound production professionals for nearly 25 years. Having spent time as a bass player in a drum and bass crossover/electro-rock band in the mid-1990s, Aitken turned his love of music and audio into a world-class business, Nimrod Sound, which he initially started as a mix-house for video games. Today, whether at home or on the road at studios like Abbey Road and The Empire, Aitken manages a wide array of recordings, works with composers and provides sonically engaging mixes to bring out the best in a musical piece for TV, film or gaming. No matter the project, or studio, Aitken relies on NUGEN Audio to deliver the ultimate sound experience, with elegant, astounding mixes, every time.

With more than 600 projects from clients that span the world, Aitken's credits include dramatic films and TV series for Netflix and the BBC, as well as for soap operas and commercials. Some of his most

recent notable work includes *I Care a Lot*, a Netflix original J. Blakeson film; *Queen Sono*, a Netflix crime drama; and the BBC's *Casualty* and *Silent Witness* TV series. Earlier work includes the BAFTA-nominated *Reservoir Dogs* and *24: The Game*, based on the popular television series, *24*.

For Aitken, NUGEN's audio tools are the top choice for mixing projects. He first stumbled upon the brand after a frustrating search for proper loudness tools to utilize on his Discovery Network projects. This hunt proved especially beneficial for his work on the *SingStar* video game.

"At the time, I was remixing commercial recordings for the game to ensure they worked a certain way, and there was a particular loudness target I had to meet," he says. "I needed some accurate tools and standard loudness solutions weren't working, so I decided to try NUGEN's VisLM meter in that application. I was very happy with the results."

Today, Aitken says he uses



**RICH AITKEN**

NUGEN's VisLM everywhere and relies on it to ensure consistency. "I use it while mastering commercial film soundtracks, to keep an eye on where I am," he says. "I tend not to master to a specific standard, I just go for what sounds right, but it's nice to know where I am. If I suddenly see something like an orchestral piece is persistently up at minus nine, I know that I'm probably doing something wrong."

Aitken generally prefers to





deliver his music projects at the right level for the film, TV or gaming project he is working on to ensure consistency when the music is combined with dialogue and sound effects. “Once I’ve gotten a piece to where I feel it’s best creatively, I don’t want clients to push the sound up and down a lot to meet their dialogue and SFX marks,” he says. “I don’t mind the mood of the sound ducking a little bit, because sometimes there’s a bit of dialogue that needs to be heard, but I hold myself responsible for having the music at the level I think it should be in the film. I want to please the composers and make sure that my directors get what they need as well.”

Now a longtime fan of the brand, Aitken most recently jumped at the opportunity to try NUGEN’s new 3D convolution reverb plug-in, Paragon. The plug-in has proven to be a welcome addition to Aitken’s audio

arsenal, and he uses it for musical scores as well as for dubbing over TV and film projects.

“Dubs have a specific kind of neutral and natural sounding need that isn’t necessarily very overt and splashy,” he explains. “In those cases, we’re often just trying to simulate a room or put someone in a space. By contrast, if you’re using a reverb for music, most of the time you’re looking to make a huge statement. I’ve always wanted to make surrounds from what are predominantly mono and stereo renders that composers give me. Not many people record in surround, but I’m expected to deliver music for films that way. NUGEN Paragon gives me the ability to create an amazing surround production from mono or stereo sources.”

While working in surround with Paragon, Aitken says he can get a

proper sounding musical element. “With Paragon’s capabilities, I’m able to create that feeling of being in a space and filling it out without making it cluttered and full of long, overt reverb sounds,” he says.

### About NUGEN Audio

The world’s top names in post-production, music and broadcast use NUGEN Audio’s award-winning loudness metering/correction, surround audio, mixing/mastering, tracking and audio analysis tools. For audio professionals, NUGEN Audio’s products offer market-leading fidelity and unrestricted creativity in every situation, providing a direct and intuitive way to work with sound. The company’s tools make it easier to deliver high-quality, compliant audio while saving time, reducing costs and preserving the creative process. ■

# SATELLITE GROUND SEGMENT IN INDIA - WAY FORWARD

*SIA-India organized an important Space conference 'Satellite Ground segment- Way forward' on Friday, 17 December 2021.*

Ground Segments are a critical part of the space ecosystem and plays a critical link between the satellites and the earth stations. Due to its limited role so far this has remained a less addressed sector in India.

SIA-India is proud to initiate this timely discussion on the important subject.

This is the first such conference on the topic with participation of some of the eminent dignitaries and industry leaders in the country. The conference was a success with participation by 25

distinguished speakers and professionals alongside Policymakers, legal experts and standards association. Close to 500 delegates from 31 countries had attended the event. Some of the eminent speakers were Shree Suneel Kumar Niraniyan, DDG, Satellite, DoT, Shri K. Rathnakara, Director, Satcom Program Office, ISRO HQ, Shri Sanjeev Kumar, CMD, Telecommunications Consultants India Limited, Shri Udai Kumar Srivastava,

Sr. DDG & Head, NTIPRIT, Department of Telecom, Dr. P. K. Jain, Associate Director, Freq. Management & Satcom Planning, Satcom PO, ISRO, Shri A. K. Mittal, Advisor-Networks, TSDSI and Mr. S. Parameswaran, Planet Aerospace, Ex-Director, MCF, ISRO

India is witnessing a satcom

So far the need for ground stations has been limited with the use of conventional satellites operating upon GSO, which operated with a single wide beam spanning a large area. Now new space brings up innovation in Launch vehicles, satellites, payloads etc. The future of space

technology lies in satellite constellations. Several satellite constellations are launched and many are planned which would be operating on the LEO and MEO through narrow beams requiring multiple earth stations and terminals for smooth

operation of satellites.

There is a rapid growth and growing interest in the ground segment market world over and this cannot be overlooked in India when talking about innovation in satellite systems. Global experts highlight that the ground segment ecosystem is at a turning point, driven by technology innovation and changes in demand patterns from private and government users.



revolution and has achieved a notable position on the global stage. As the space segment matures from limited earth observation and communication applications to the multiple constellations that need to be supported with necessary ground infrastructure, including multiple gateways, data centers and communications links, the ground segment requirements increase enormously.



“In India the share of ground equipment in the total space economy is 48% at \$3.4 Billion, which is the highest followed by the share of space application services at 45%, rocket launch service at 2% and manufacturing of satellites 5%. Even though the contribution in totality is substantial, in actual terms it is negligible in the global Ground Segment market. Globally, the Ground Segment is projected to be \$67 Billion cumulated market from 2021 to 2030” Dr. Subba Rao Pavuluri, President, Satcom Industry Association (India) and CMD, Ananth Technologies Ltd



## Satellite Ground Segment Technologies:

‘The underlying technology, Multi-frequency operations including optical, Software-defined networking, Virtualization, Manufacturing and collaborations, cloudification, Security etc. The govt. aims for a satcom revolution in the country and to achieve that, transformative initiatives have to be taken at the highest level. From creating state-of-the-art infrastructure to providing services, from indigenous manufacturing of products to human resource development.



“Various measures are being taken to simplify the processes involved in getting the clearances for the Satcom sector in India”. Shri Suneel Kumar Niraniyan, DDG, Satellite, DoT

The half-day virtual conference deliberated upon three key topics under three panel discussion/session:

1. Satellite ground segment technologies
2. The satellite ground segment business economics
3. Standardization in Ground Segment

Unlocking of this huge potential calls for innovative and pragmatic approach along with diligent implementation. A resilient end-to-end ground segment, with a high level of security, is very critical today. The task is huge for all the stakeholders to shape a new route of success.

"The ground segment ecosystem is driven by technology innovation. For high throughput ground stations, we need gateways to be shared by multiple users to reduce the cost and have a commercially viable business model." Shri K. Rathnakara, Director, SPO, ISRO

## Satellite Ground Segment Business Economics:

This session focused on the pricing models, business drivers, operational models, regulatory hurdles and international best practices. Global best practices suggest that the demand and market economics will bring the costs (CAPEX and OPEX) down gradually; especially a shift of functionality moving into the cloud will result in virtualizing the services in line with





Ground Station as a Service trends (GSAAS). The ground stations are not just driven by technology innovation but also need to be shared with multiple users to reduce the cost and have a commercially viable business model. The market and business models must be explored in this context with M&A transactions and strategic partnerships providing unparalleled end-user experience and value add to the economy.

"Satellites hold the potential to reach out to areas where other technologies cannot provided the services" Shri Sanjeev Kumar, CMD, TCIL INDIA

## Standardization in Satellite Ground Segment:

The panel discussed the need, efforts and developments on Standardization and global harmonization that impact the Satellite Ground Segment. Data collection is at a nascent stage in India and in absence of Data Protection Law, Standards would play a critical role to protect businesses in case of liability. Standardization can help in making sure the scale is reached, and ensure seamless interoperability between systems. It will also allow the companies to create new technologies and compete with each other on new capabilities. India has to move very fast in terms of bringing facilitating policies and catch up with the global developments.

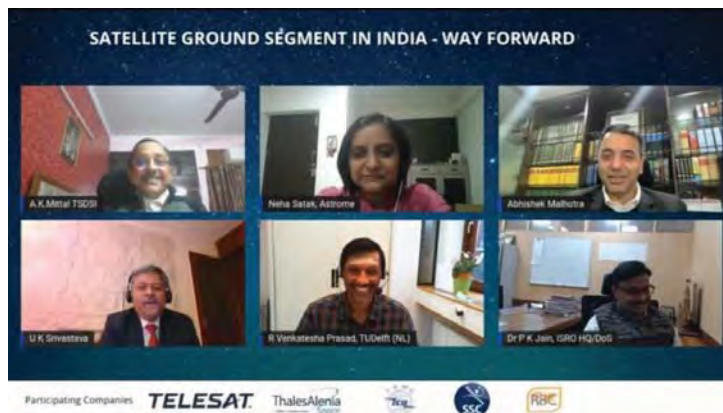
"The government is committed to having an open-minded approach to promote standardization which will allow the companies to create new technologies and compete with each other on new

capabilities". Shri Udai Kumar Srivastava, Sr DDG & Head, NTIPRIT, DOT

## Conclusion:

A Capex high industry with long gestation period like the Space sector where the ground segments hold a substantial chunk, needs a long term vision and timely policy decisions. The government is focused in an effort to build on the foundational eras of space communication, competition and cooperation to facilitate a conducive space for an increased private sector participation. There are several key policy decisions announced and several are in the draft stage to create a robust digital infrastructure to connect the unconnected.

The new draft Spacecom Policy would be addressing the ground segment sector, licensing, spectrum as well as ease of doing business. With newer High Throughput Satellites (HTS), new antennas will be needed to track mega constellations, driving a huge demand in frequency needs. Availability of spectrum is critical for both the constellations and its ground counterpart. Once the foundational rules are set,



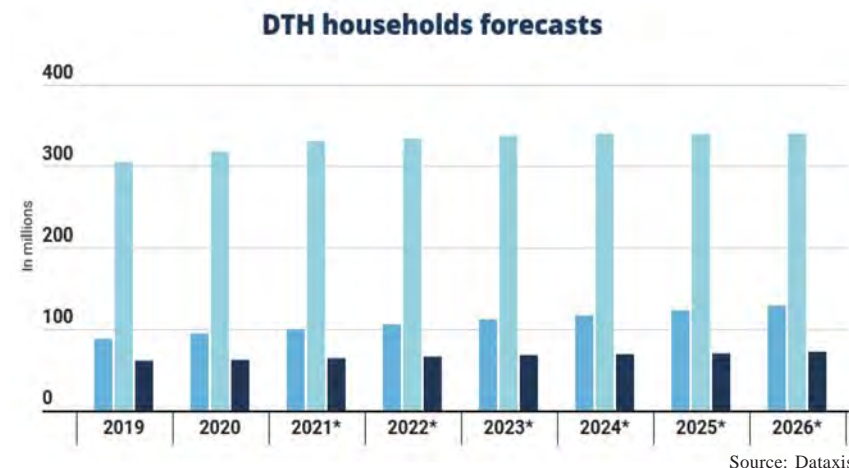
India would be all set to take the next leap of getting a rightful pie of the world space economy by exploiting the space capabilities for fulfilling the unmet needs of the nation and tapping into domestic and international markets. ■

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# STATE OF FIXED SATELLITE COMMUNICATION MARKET 2021

Dataxis has recently published its report on the Fixed Satellite Services (FSS) civil communications market. After years of significant growth, the decline in traditional video activity in the most developed countries is being sustained, resulting in a limited but steady decline in the turnover of FSS operators. The outlook for the future is equally becoming more pronounced.

Among the 45 civil communications satellite operators worldwide, the main players remain SES, Intelsat and Eutelsat. As regards to the operators' fleet, a steady decline in new satellite launches can be noted. This naturally impinges on leading satellite platform providers worldwide: while in the course of 2018, 18 satellites were launched, the number decreased to 13 in 2019 and 9 in 2020. This market remains dominated by the Franco-German Airbus Space and the Franco-Italian Thales Alenia Space. In the launcher market, the French company Arianespace has maintained a prominent position, although it is facing growing competition from SpaceX. However, since control of



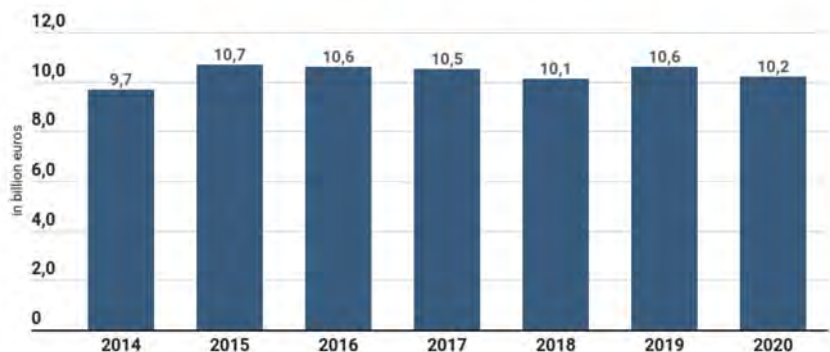
space technologies is also a sovereignty issue, several countries, like Turkey with Turkish Aerospace, have developed their own offers to satisfy national demand on top of existing projects from China (CALT) or India (Antrix).

Dataxis observes that the growth of the FSS market increasingly depends on the development of adapted broadband offers, whether to satisfy retail or backhaul needs. Ka-band capacity is therefore significantly growing for most operators,

particularly Eutelsat and Viasat. This approach, however, is being challenged by low or medium-orbit satellite constellation projects, the most emblematic being SpaceX's Starlink. SpaceX's revolution with cheaper and reusable launchers has changed the outlook when it comes to launching several hundred or thousands of satellites swiftly. In addition to Amazon's Kuiper projects, there are initiatives linked to incumbent FSS operators, such as Telesat's Lightspeed, 03B Networks

## Dataxis

## Fixed satellite revenues - Worldwide



Source: Dataxis

(SES) and Oneweb, in which Eutelsat is also a shareholder.

It appears likely that historical FSS operators will not be sidelined in the constellation market in the coming years.

Dataxis has also issued its 2026 forecasts for the global satellite TV markets. It appears fairly obvious that some geographical areas are still very appealing for satellite video, most

particularly Africa and MENA, as well as Asia-Pacific.

As far as one of the growth drivers is concerned, namely broadband, Dataxis reckons that this market will be relatively marginal in Western countries as a replacement or alternative to wireline or mobile offers. Nevertheless, although volumes are limited compared to fiber or 4G/5G, there is still significant

growth potential for satellite operators. The capacity available can be filled by a relatively small number of internet subscribers. Additionally, the total number of satellite internet subscribers is relatively small according to Dataxis' data and can be further expanded with offers that are more in line with current needs.

A significant part of the forthcoming growth of civil satellite operators will stem from the maritime and aviation sectors. The need for seamless broadband connectivity now extends to all locations and situations. In the maritime and aviation industries, fixed and mobile operators do not provide adequate solutions, making satellite operators, both FSS and constellation, ideally positioned. The recent acquisition of Inmarsat by Viasat is a striking example of this situation. ■



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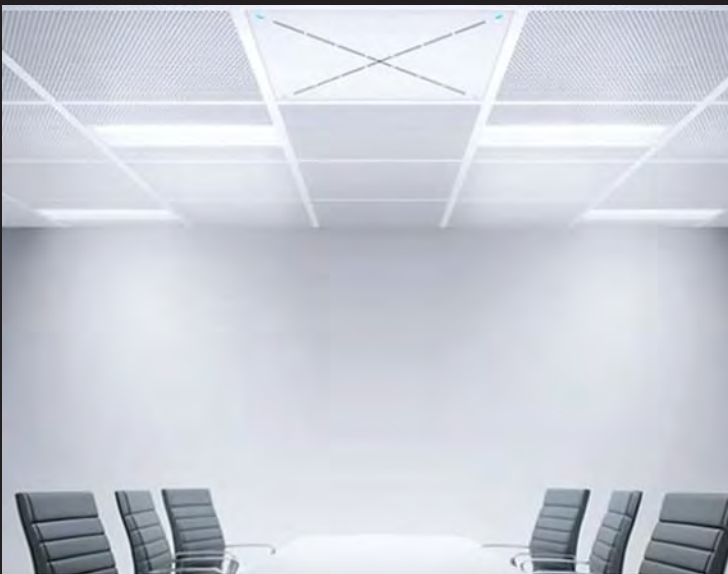
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# ENSURING MAXIMUM EFFICIENCY FOR A COLLABORATIVE WORKFORCE

*Collaboration is about being empowered to work together through technology.*

Conferencing is about collaboration, and better conferencing is more than just technology. It's about enabling people to seamlessly connect and collaborate without having to focus on the technology or being concerned if the equipment is working. Collaboration is about being empowered to work together through technology. Hence it is imperative to have solutions that combine premium performance and refined aesthetics that deliver a fully integrated meeting room solution to shape the future of unified communications experiences.

Sennheiser, one of the leading audio brands has been committed to offering solutions that



provide an in-ceiling unified communications solution that delivers the quality audio, ease of use and

performance needed for productive meetings every single day.

## Hybrid work environment is here to stay

Hybrid work environment have become the new norm for many businesses and education establishments who see added opportunities with the inclusion of remote participants beyond the constraints of a pandemic. Sennheiser TeamConnect Ceiling 2 (TCC2) beamforming microphone is a tool that makes hybrid meetings a place where

people can connect and unfold their creativity and productivity together. TCC2 not only reliably picks up a

speaker no matter where they are moving within the room, but also caters to voice-lift applications for larger rooms via its TruVoicelift function.

### Embracing the wireless ecosystem

Sennheiser's Evolution Wireless Digital (EW-D) is ideal for corporations and education facilities that are not in need of a fully-scaled, networked and centrally monitored system but are looking for a straightforward and versatile wireless microphone solution. Introducing an easy, app-based workflow, EW-D retains all the professionalism, multi-channel capability and reliability that users have come to expect of Sennheiser's UHF and 1G8 microphones.

Evolution Wireless Digital transmitters feature an input dynamic range of 134 dB, five times more than the usual 120 dB, enabling it to pick up anything from a very soft whisper to a jet engine at 50 yards' distance. Borrowing tech from Sennheiser's top Digital 6000 and Digital 9000 series, EW-D does not generate any significant intermodulation products, so more channels can be accommodated in a given frequency window. The systems have exceptional specs in every detail, be it a low latency of 1.9 milliseconds and a transmitter battery life of up to 12 hours with the BA 70 rechargeable battery pack, or the bandwidth of 56 MHz with up to 90 channels per band, which makes it easy to find space even in crowded RF environments.



### Transforming listening experiences with MobileConnect

With tens of thousands of hearing-impaired students attending universities globally, it is imperative to create an atmosphere where assistive listening systems can help break audio barriers and make learning truly inclusive. Often, limitations of traditional assistive listening technology can be a significant hurdle for hearing-impaired students,

diminishing their listening experience and unnecessarily highlighting disabilities. By contrast, assistive listening over Wi-Fi as offered by MobileConnect overcomes these limitations: Students are able to hear their instructors' lessons in crystal-clear audio using their own mobile phones as receivers, while professors can lecture with full confidence that all students are hearing critical lesson points and can fully participate in discussions. ■



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# IABM ANNOUNCES WINNERS OF 2021 BAM AWARDS® AND ANNUAL IABM AWARDS



IABM have announced the winners of the 2021 BaM Awards® and the Annual IABM Awards at a virtual event held on its BaM Zone™ digital engagement platform with attendees from around the world. As with 2020, the cancellation of exhibitions again this year has meant that the usual two editions of the BaM Awards, held at NAB Show and IBC, have been rolled into a single event.

The BaM Award® winners are chosen from nine individual categories described by the BaM Content Chain®, as well as a tenth category recognizing an outstanding project or collaboration. The judging was carried out by a panel of more than 40 independent, expert judges, each with specialist expertise in one or more of the awards categories.

The Annual Award winners were chosen from entries across a total of five categories: Andrew Jones Young Person of the Year; Technology Leader of the Year; and the Broadcast/Media Company of the Year – augmented with two new awards for

this year: Environmental Sustainability; and Most Inclusive Company.

The BaM Awards® winners are listed below by category, with abridged judges' comments appended:

## **Create**

### **EVS - XtraMotion**

“Leveraging cloud processing and machine learning, XtraMotion is a new software application that enables the transformation of footage from any camera angle on a production into high-speed video using frame interpolation. As a result, productions can easily increase their super slow-motion coverage without any extra cost and without the need for additional hardware on-site.”

## **Produce**

### **Mo-Sys – VP Pro XR**

“High quality blending of real and virtual events. Great engineering solving real-world problems and helping adoption of new film-making techniques. Impressive results with this technology for future virtual productions. The future is here, now.”

## **Manage**

### **Synchronized – Smart-AdBreaks**

“Doing more with less – always

a winner. Great to see an entry that's linked to both revenue and a real-world customer. Great data-driven advertising solution and highlighting a collaboration with an end-user as well.”

## **Publish**

### **Eluvio – Broadcast TV's first major NFT endeavor: the Masked Singer on Fox**

“This entry proves once again how Blockchain really is going to transform media and how we need to start preparing now for web 3.0.”

## **Monetize**

### **EON Media – Computer vision and real-time brand ROI for live broadcast and VOD content**

“Great point solution that enables media businesses to gather more data for advertising measurement. An interesting and innovative solution – leveraging image recognition technology to deliver a new use case, supported by a case study.”

## **Consume**

### **Worldcast – Tagit Interactive**

“A compelling solution specific to radio, which makes a clear link between interactivity and data.”



**Connect****Vizrt – *Connecting the world with NDI® 5***

“This submission stands out not just for being so well placed when broadcasting in Covid times, but also for the enormous opportunities ahead in terms of more climate-friendly remote production, and cameras (but not necessarily OBs) everywhere. NDI 5 is bringing the benefits of IP studio to the mass market with a very wide adoption; the Bridge product enables global connectivity.”

**Store****Quantiphi – *AI-powered video de-duplication***

“Very few media organizations get to implement new technology without having to negotiate legacy issues. Any library is built up over time, in different systems, for different purposes and managed in different ways. Utilizing AI to identify what is related and what the differences are, has untold benefits.”

**Support****Telos Alliance – *Telos Infinity® Virtual Intercom Platform (VIP)***

“Fills an important need. An innovative product that simplifies infrastructure costs and adds flexibility. What’s cool about this system is that it’s like also bring your own device, phone, PC etc; congratulations to the Telos Alliance team!”

**Project, collaboration or event**  
**Intel, Spin Digital, Globo – *Powering the Olympic Games Tokyo live streaming in 8K, 60 fps, HDR over the open Internet***

“The 2020 Olympics had been ambitiously trailed as 8K over many years but to stream this over the open Internet in 60 fps, 10-bit HDR was totally surprising – a groundbreaking achievement. The figures on the data handling are incredible.”

The IABM Annual Awards winners are listed below with relevant nomination or judges’ quotes included:

**Andrew Jones Young Person of the Year**

This award is named in honor of IABM friend and colleague Andrew Jones who we sadly lost in 2019. Andrew was IABM’s Head of Training and played a vital part in the development of our educational initiatives and fostering the next generation of talented people for our industry. The award recognizes someone new to the industry (under 25 years old) for their hard work, diligence and potential. The 2021 winner is:

**Anna Matic**

Anna Matic is 23 years old and works as a Software Developer at nanocosmos. She currently works part time at nanocosmos while completing her Master of Science in IT Systems Engineering at the Hasso Plattner Institute. Anna started working at nanocosmos in 2019 on several projects that have had a huge impact for the company’s ‘nanoStream Cloud’ live streaming solution.

Anna has an exceptional ability to plan, develop and program for a project according to the latest standards yet covering the entire appearance of the user interface. She is working across departments bringing together programming / coding and design concepts. Her innovative design applies to small elements, but also to the bigger picture ensuring elements tie into corporate design and the latest technical requirements.

**Technology Leader of the Year**

This award recognizes a person who is at the forefront of disruption and innovation within the broadcast and media industry who, through inspired leadership, has helped to

deliver ground-breaking technology and business benefits. The 2021 winner is:

**Andy Beale - Head of Engineering and Innovation, BT Sport**

Andy has been the Chief Engineer for BT Sport since its inception and has been pivotal in steering its rich history of innovation from industry-first launches of 4k, Dolby Atmos, AR, 360, and 8k. During the last year Andy has taken the lead in transforming how BT Sport and the industry has transitioned to live remote production. His key focus is using technology for good and his priorities have been driven by staff welfare and safety, well-being, accessibility, sustainability and enhancing creative options.

His focus on adaptability has been key in ensuring technology is the enabler and not the driver. He has led on BT Sport completely transitioning its operating model to hybrid home, studio site working and he never stands still, as demonstrated with the new cloud production workflows being implemented for BT Sport’s Ashes programming. Andy engages enthusiastically with the wider industry in developing processes and sharing learnings for the better of people who work in the industry and his particular leadership on sustainability and accessibility has been incredible.

Andy’s passion for the industry and ensuring it is sustainable long term by becoming more inclusive and diverse is equally impressive as demonstrated by the leadership role he has taken on in establishing and implementing the industry-wide Rise Up initiative and also the award-winning BT Sport United portfolio. Technically Andy is a very creative thinker but

one who always works to a core principle making him a fantastic role model, who has really shone over the last 12 months.

### Broadcast/Media Company of the Year

This award recognizes and rewards broadcasters or media companies that have demonstrated throughout the year that they are at the forefront of creating and distributing ground-breaking content through innovation across the content chain. The 2021 winner is:

#### beIN Media Group

beIN Media produced outstanding coverage of Euro 2020 - the first major live sporting event since the March 2020 worldwide lockdown. It did this despite ongoing Covid restrictions and achieved almost 1 billion views across the MENA region, combining 15 hours of live daily studio coverage with expert analysis from local and international talent and 18 on-the-ground reporters in 11 European countries. All of this while continuing to broadcast the rest of beIN's substantial summer of sports coverage – a fantastic achievement, especially considering the enormous difficulties caused by the pandemic.

### Environmental Sustainability

Like very industry, broadcast and media is accountable for its effects on our beautiful but fragile planet. But as companies increasingly label themselves “eco-friendly,” it can be tricky to identify the companies that are truly eco-friendly and those that are merely jumping on the environmental bandwagon for “green marketing.” This award recognizes companies that have made real strides in reducing their carbon footprint. The 2021 winner is:

#### Blackbird

Blackbird is spearheading the critical issue of sustainability within the broadcast media and video industry. Blackbird's cloud native production technology has been independently found to generate up to 91% less CO2 at source than on-prem and cloud-based workflows because it requires no special hardware or virtual machine, runs on any laptop, uses only 2Mbps bandwidth and, of course, eliminates travel to venues. Blackbird is delivering real, tangible environmental benefits to both its customers and the wider world.

### Most Inclusive Company

In today's volatile business reality, diversity and inclusion are more important than ever. Yet measurable progress in increasing workplace diversity and inclusion is often slow to non-existent. This precisely why IABM created this award to honor the companies that are keeping this front and centre within their organizations. The 2021 winner is:

#### BT Sport

BT Sport has taken real action right across its operation to promote Diversity and Inclusion. Well over 100 of its staff have taken part in a dedicated D&I programme, and it has produced a premier league football match with all-female on-screen talent and production.

BT Sport is also a founder member of Rise Up, inspiring girls into the industry, has done takeover days with a college to enable students to create a BT Sport show, and its School 21 programme engages students from many backgrounds. It also got right behind International Women's Day in March this year, including again

all-female crew and talent for its football coverage. BT Sport also celebrated Black History month 2021 with all-new educational, entertaining and inspiring content. And earlier this year, formed Hope United, a diverse team of footballers who came together to educate the country on the digital skills needed to tackle online hate.

For all these reasons, BT Sport is a shining example of front-foot Inclusivity, and a worthy winner of this award.

“Chairing the judging for these awards is always a pleasure – it's fantastic to see such a huge amount of brilliant innovation; once again this year we have seen that innovation is not just alive and well but positively thriving in Broadcast, Media and Entertainment,” said Stan Moote, CTO at IABM and chair of the awards judging panel. “And as well as innovating to keep ahead of the rapidly transforming technology landscape, it's also great to see that our industry is fully on board for addressing wider subjects, including leadership, sustainability and diversity & inclusion.”

IABM ([www.theiabm.org](http://www.theiabm.org)) is the international trade association for broadcast and media technology. IABM facilitates the important networking and interaction between suppliers that shape and define the unique ecosystem of the broadcast and media technology industry.

IABM supports member companies with a comprehensive range of services across market intelligence, training, technology, exhibitions and best practices – all designed to help them do better business. We hold the interests of member companies as paramount, and strive to provide strong guidance and support at every level in all geographies. ■

# 2021

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- ❖ Home Page - \$250 per month
- ❖ News & Feature Page - \$150 per month

### Emailers

- ❖ Dedicated broadcast e-mail \$ 200 – 1 round
- ❖ Broadcast & Film e-newsletter banner \$ 200 – 1 insertion

### Web Requirements

- ◆ Home Page - width 300 pixels x depth 250 pixels
- ◆ News Page - width 160 pixels x depth 600 pixels



## Bi-Monthly Digital Edition of Broadcast&Film Magazine

- ❖ Full page Color Ad – \$ 250 – 1 insertion (Size: W 200mm x H 265mm)



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