

BROADCAST - FILM - POST - INFOTAINMENT TECHNOLOGY

# **B** BROADCAST & FILM

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

MARCH - APRIL 2021

NÜRNBERG MESSE

## VFX, ANIMATION & BEYOND SURGING AHEAD



**2021**  
**Media Kit**

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

# BROADCAST & FILM

- Your #1 Resource to Reach

**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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**For advertising, please contact Manoj Madhavan:**  
**Mob.: 91-9167331339 | Email: manoj.madhavan@nm-india.com**

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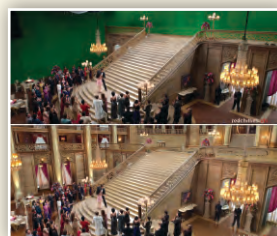
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For advertising, please contact Manoj Madhavan:  
Mob.: 91-9167331339 | Email: manoj.madhavan@nm-india.com  
312/313, A Wing, 3rd Floor, Dynasty Business Park, Andheri Kurla Road, Andheri (E), Mumbai – 400059.  
Tel.: +91-22-6216 5313 | Mob.: +91-91082 32956 | www.broadcastandfilm.com



**Editor:**

**MANOJ MADHAVAN**

manoj.madhavan@nm-india.com

**Production:**

**PRASHANT KARANGUTKAR**

**NÜRNBERG MESSE**

**Editorial & Advertising**

**NürnbergMesse India Pvt. Ltd.**

312/313, A Wing, 3rd Floor, Dynasty Business Park,  
Andheri Kurla Road, Andheri (E), Mumbai – 400059.

Tel.: +91-22-6216 5313

Mob.: +91-91082 32956

Email: manoj.madhavan@nm-india.com

www.broadcastandfilm.com

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**NürnbergMesse India Pvt. Ltd.**

312/313, A Wing, 3rd Floor, Dynasty Business Park,  
Andheri Kurla Road, Andheri (E), Mumbai – 400059.





**MANOJ MADHAVAN**  
Editor

*The entertainment ecosystem in India boasts of an impressive infrastructure of post houses, VFX studios which deliver quality work.*

*The OTT players have registered phenomenal growth in the pandemic in terms of revenues and addition in subscribers. IP development has opened new doors for Indian studios who were traditionally service oriented, as OTT platforms are allowing international audiences to consume such content.*

[manoj.madhavan@nm-india.com](mailto:manoj.madhavan@nm-india.com)

## From the Editor's Desk

*The Indian Media and Entertainment (M&E) sector is expected to grow by 25% in 2021 and is expected to reach INR 1.73 trillion (US\$23.7 billion) states **FICCI-EY report 'Playing by new rules'**. With its current trajectory, the M&E sector in India is expected to reach INR 2.23 trillion (US\$30.6 billion) by 2023 at a CAGR of 17%.*

*In 2020 television continued to remain the largest segment. Television segment revenues are expected to grow at a CAGR of 7% to reach INR847 billion by 2023 driven by increased base of subscribers as households continue to get televised. Growth will be driven by connected TVs which could cross 40 million homes by 2025 and free television could cross 50 million homes by then. Paid OTT subscriptions crossed 50 million for the first time in 2020.*

*The VFX and Animation studios witnessed a surge in content demand for domestic shows which is expected to rise in the next few years.*

*These figures will prove to be very reassuring to an industry segment which has been very badly impacted by the pandemic.*

*IABM Special Report - 'Charting the Uncharted' highlights how traditional broadcasters have moved rapidly to supplement their output with DTC offerings, and to search for the necessary scale to compete with the digital giants through acquisition or consolidation as well as increased investment in content. IABM's CTO, Stan Moote shows the changes made in 2020 by the stakeholders in the media ecosystem helped in giving a fresh perspective to all businesses in the media content chain.*

*The major financial resurgence by the OTT players and news channel during the course of the pandemic is featured in this issue. The 'Entertainment' industry believes in the maxim 'The Show Must Go On'. And the hope is that 2021 despite being a difficult year will usher a sense of positivity and a ray of hope.*

**Manoj Madhavan - Editor**

## PFT SECURES A PATENT FOR ITS JUST-IN-TIME WATERMARKING SOLUTION WITHIN CLEAR

Prime Focus Technologies (PFT) announced that the United States Patent and Trademark Office has issued a patent (U.S. Patent No. 10,904,595) for its Just-in-Time embedded watermarking solution of streaming proxies within CLEAR™.

The studios and content owners typically rely on invisible watermarks (commonly referred to as forensic watermarks) as there exists no technology that transcodes content in real-time to apply the visual user watermark without impairing the user experience. While these served the purpose of traceability in the event of a leak, they couldn't deter such leaks from happening. Hence the reliance on UI over-lay-based, visual watermarks.



This patented solution comes with two major innovations: (1) the ability to apply user-specific burnt-in watermarks, real-time and (2) make the experience of a “Just-In-Time-Watermarked” stream as seamless as that of a CLEAN stream. At its core, this invention treats every streaming-segment request from a user's video player, as an atomic segment that will need to be transcoded by a GPU-farm and handed back in real-time to the player. All this, in conformance with the needs of the standard streaming protocols including HLS/DASH among others. Consequently,

- ❖ Any segment requested, across any bit rate, is served with a watermark and
- ❖ Any high-speed trick-play request (up to 3X) is served elegantly, since it relies on high-speed transcodes through the GPU farm.

## PADMA SHRI, SANTOSH SIVAN JOINS CANON'S DISTINGUISHED CINEMA EOS AMBASSADOR PROGRAM



In-line with strengthening its EOS Ambassador program in India, Canon, has onboarded eminent Director, Cinematographer and Filmmaker, Santosh Sivan as part of its celebrated Cinema EOS Ambassador program. Sivan is one of the most acclaimed cinematographers in the Indian film fraternity and brings to the table an experience of over 30 years. He has worked on various

films across Malayalam, Tamil, Hindi, and Telugu languages and is most renowned for his work in the South Indian film industry especially Malayalam cinema. He has won 14 National Awards and for his outstanding contribution to Indian cinema, he has been awarded the reputed Padma Shri by the President of India in 2014.

Sivan's passion for the art of filmmaking made him a founding member of the Indian Society of Cinematographers (ISC) and he is also the only Indian representative at the American Society of Cinematographers (ASC). He shot to prominence on the national stage with Mani Ratnam's *Thalapathi* and is celebrated for his work in movies such as *Roja*, *Dil Se*, *Iruvar*, and *Kaala Pani*. He is not only respected in the Indian film industry but is also applauded internationally for his stellar work. He has 21 international awards and credits include *Bride & Prejudice*, *Mistress Of Spices*, and *The Terrorist* (premiered at BFI London Film Festival). Some of his most recent films include *Lies We Tell*, *Chekkha Chivantha Vaanam* and the famous *Darbar* with Rajnikanth. While his film *Mumbaikar* is currently in the post production stage and shooting for his film *Barroz* just started.

Sivan is looking forward working with with the latest cinema camera launched by Canon, the EOS C70 Cinema camera which is Canon's first RF Mount Cinema EOS Camera and exploring the same to create unique OTT content.

Commenting on the Cinema EOS Ambassador Program, Mr. C Sukumaran, Director- Consumer Systems Products and Imaging Communication Products said, “We are excited to onboard Mr. Santosh Sivan, a legend and an industry veteran with an impeccable sense of visual storytelling, as our Canon Cinema EOS Ambassador. Bold and inspirational, the Canon EOS Ambassador program represents and supports current and future generations of photographers and filmmakers. With his experience and passion, Mr. Sivan is the ideal ambassador to not only spearhead change in the motion pictures industry but also share Canon's vision for visual storytelling.”

“With the remarkable rise of OTT content, the broadcast industry has been witnessing several transformations in recent times and that is where the experience of creators like Mr. Sivan counts the most. Through our Canon Cinema EOS Ambassadors, we aim to spread of filmmaking not only in terms of being in tune with the latest trends but also the best-suited technology.”

Speaking about partnering with Canon as a Cinema EOS Ambassador, Mr. Santosh Sivan said, “I am delighted to be a part of the Canon EOS Cinema Ambassador family. Through the years, Canon has been introducing groundbreaking technology in the field of Cinema which has enabled filmmakers like me to truly depict our vision into reality on film. And through this program, I

## MARSHALL FURTHER EXPANDS IP WORKFLOW CAPABILITIES WITH ADDITIONAL CAMERA CHOICES

Marshall Electronics continues to develop new cameras designed to improve IP workflows. Marshall released two levels of 4K PTZ cameras within the last year with 30x optical zoom and professional grade sensors: one with up to 4K30 (CV630) resolution and one with up to 4K60 (CV730) resolution. Marshall also recently offered two levels of fixed position cameras with 30x optical zoom and professional grade sensors: one with up to HD60 (CV355-30X) resolution and one with up to UHD60 (CV420-30X).

In looking forward to 2021, Marshall is scheduled to launch a High-Bandwidth NDI® PTZ camera (CV730-BHN) late Q3 with up to 4K60 resolution and 30x optical zoom packed with High-Bandwidth NDI®, NDI®|HX and simultaneous 12GSDI/HDMI2.0 outputs. Also planned for later this year, Marshall has its CV620-BI with 20x optical zoom 3GSDI, HDMI and IP/HEVC/SRT, and the CV620-BN with 20x optical zoom 3GSDI, HDMI and NDI®|HX on its product roadmap.

“Marshall was one of the first adopters of the NDI® platform, building the technology into our PTZ cameras several years ago and watching the technology progress with greatly improved NDI® Tools, lower latency, ease of discovery and the ability to mix different media types into the NDI® workflow,” says Tod Musgrave, Director of Cameras for Marshall Electronics. “Marshall is completely behind the big push in IP cameras with PTZ and fixed position camera options, whether it’s standard IP (HEVC), Haivision SRT or Newtek NDI®. We, as a company, have double-downed, triple-downed, even gone ALL-IN on the future of IP in broadcast and proAV.”

also get the chance to not only work closely with Canon but also promote the passion for art in the photography-loving nation that we are.”

“I am excited to introduce to the audience my new work on OTT platforms soon and I believe that choosing a Cinema EOS camera paired with Mirrorless RF technology is an ideal combination in terms of technology. My current picks include the versatile Canon Cinema EOS C70 camera and shall further add the revolutionary mirrorless Canon EOS R5 camera with 8k video recording abilities.”

Known for associating with stalwarts of the photography community, Canon has a diverse set of filmmakers as part of its Canon EOS Cinema Ambassador. Other acclaimed cinematographers as part of the program include Sumer Verma – Underwater Cinema domain, Alphonse Roy, Bedi Brothers (Vijay Bedi & Ajay Bedi), Priya Thuvassery, and Rajesh Gupta.

## PRONOLOGY INTRODUCES UPGRADED NAS SOLUTION AND NEW THUNDERBOLT 3 STORAGE APPLIANCE



Pronology, a developer of cutting-edge tapeless workflow solutions, expands its ruggedized, portable, high-performance storage offerings with the newly updated rNAS.m4, a Network Attached Storage (NAS) solution, along with its new rTB appliance, which utilizes a Thunderbolt 3 interface.

rNAS.m4 was developed in direct response to customer requests for resilient, high-performance storage that can stand up to the rigors of remote production and transportation. It is optimized for reading and writing concurrent media streams in a compact form factor. It allows for the acquisition and transport of broadcast media assets and all other types of data in a road-ready enclosure. rNAS.m4 easily handles the increased amounts of data required by 4K productions. This compact and extremely durable NAS solution is also rack-mountable and features a proprietary external status display module.

rTB by Pronology is a rugged, portable, high performance storage appliance utilizing a Thunderbolt 3 interface. Like rNAS, rTB is compact, rack-mountable, vibration and impact resistant. rTB is ideal for users who want the industries’ best hardware RAID technology with the speed and performance of Thunderbolt connectivity.

Both rNAS.m4 and rTB feature hot swappable drives all while being lightweight, desktop quiet and nearly indestructible. Both appliances are available with custom hard or soft carrying cases to allow for safe and easy transportation of invaluable data and media assets. rNAS.m4 and rTB are available through storage product resellers and Versatile Distribution Services in the U.S.

## THESMALLBIGIDEA WINS SOCIAL MEDIA DUTIES FOR ALTBALAJI

Full services digital and social media marketing agency, TheSmallBigIdea, has been awarded with the social media duties for ALTBalaji, Balaji Telefilms’ subscription based video-on-demand platform. Within just seven years of



## MO-SYS DIGUISE ENDORSES STARTRACKER FOR XR

Mo-Sys Engineering (www.mo-sys.com), world leader in precision camera tracking solutions for virtual production and image robotics, announced that its partner disguise (www.disguise.one) has a number of customers and partners adopting StarTracker technology for XR and virtual production. disguise customers have been adopting StarTracker systems with disguise xR technology, and disguise has seen strong demand in the fast-growing APAC market for the combined solution.

StarTracker is Mo-Sys's



precision 6-axis camera and lens tracking system, designed for use with XR stages, LED volumes, and green/blue screens, for broadcast or for film VFX production. Along with real-time photo-realistic graphics, and real-time compositing, these three technologies have enabled the current explosion in virtual production for both VFX-heavy feature films, television series, and sports production.

"We are delighted that not only has disguise selected StarTracker for demo usage in its local offices," said Mike Grieve, Commercial Director of Mo-Sys, "but also that their customers are adopting StarTracker technology for XR shows, events, and virtual production."



operation, the agency has grown from strength to strength on the back of data driven insights and content backed by their in-house analytics tool 'ACE'. The addition of ALTBalaji, further leverages the agency's entertainment portfolio and helps it establish itself as a partner of choice amongst the media and entertainment brands for their social and digital marketing needs.

As a part of the mandate, TheSmallBigIdea will focus on leveraging ALTBalaji's existing presence on social media platforms to captivate and reach out to newer audiences. In addition to this, the agency will strengthen the brand's social position through neo-social platforms like Moj, Taka Tak, Chingari, Roposo and through online database platform, IMDb. The mandate includes the agency to focus on conceptualizing and publishing content, and engaging with influencers on social media platforms to create a buzz about their path-breaking shows launching every month.

In alignment with ALTBalaji's objective, TheSmallBigIdea through its collaboration with Mayur Jumani, garnered 247K organic views for three of their recently launched shows titled 'Hello Jee', 'Dev DD' and 'Bang Baang'. With their data driven strategy and creative communication approach, the campaign led to a significant increase in the brand's social media positioning.

TheSmallBigIdea is a full services digital marketing agency that provides services such as Social Media Management, Video Content Production, Digital Media Planning & Buying, Social Listening & ORM services, Augmented & Virtual Reality amongst other ancillary marketing services. Recognized for their propriety creative-tech tool ACE, 'The Small Big Idea' has enabled brands to arrive at campaign messaging by integrating insights from social sentiments & enterprise data.

## VIACOM18 RESTRUCTURES ITS LEADERSHIP TEAM



Viacom18, India's fastest growing M&E network, announced changes in its leadership team to focus on scaling and bolstering its digital and broadcast businesses. Driving the agenda of growing its digital subscription businesses, in his new role, Ferzad Palia will head all SVOD services (Voot Select & Voot Kids) and International expansion for Voot and will report to Gourav Rakshit, COO, Viacom18 Digital Ventures.

The network's Youth, Music and English Entertainment business, comprising of channels that are leaders in their respective categories, will now be led by Anshul Ailawadi, erstwhile strategy and project management lead at the Group CEO's office. Anshul will be reporting to Rahul Joshi, Managing Director, Network18, in his new role.

In its endeavour to become a future-proof organisation, identifying opportunities to drive synergies is crucial. Ferzad has led the growth of the network's Youth, Music and English Entertainment business for the past 16 years. More recently he launched Voot Select that has already raced to add 1mn+

## NOKIA AND SAMSUNG SIGN PATENT LICENSING AGREEMENT FOR VIDEO STANDARDS



Nokia announced that it has signed a patent license agreement with Samsung, which covers the use of Nokia's innovations in video standards. Under the agreement, Samsung will make royalty payments to Nokia. The terms of the agreement remain confidential between the parties.

Jenni Lukander, President of Nokia Technologies, said: "We are delighted to have reached an agreement with Samsung which further validates Nokia's decades-long investments to R&D and contributions to multimedia and video technology standards."

Over the course of more than 30 years, Nokia has contributed significantly to multimedia and video research and the development of industry standards. The work of Nokia's engineers in the field of video research and standardization has been recognized with numerous international awards, including four Technology & Engineering Emmy® Awards.

Nokia's industry-leading patent portfolio is built on more than €129 billion invested in R&D over the past two decades and is composed of around 20,000 patent families, including over 3,500 patent families declared essential to 5G. Nokia contributes its inventions to open standards in return for the right to license them on fair, reasonable and non-discriminatory (FRAND) terms. Companies can license and use these technologies without the need to make their own substantial investments in R&D.

subscribers within a year. He will now look to cohesively grow Viacom18's SVoD and International digital businesses. Anshul has played a key role in the growth of Viacom18 over the last 6 years and is a strong proponent of the tremendous fandom, and the potential business opportunity that the YME brands of Viacom18 command. In a young country like India, these brands have a long runway for growth, especially given the proliferation of digital platforms.

Viacom18 forayed into digital subscription businesses in late 2019 with Voot Kids that was closely followed by Voot Select launched in March 2020. Voot Select recently reported acquiring over 1mn subscribers in its first year and though being a late entrant in the category it's the fastest growing broadcaster-backed OTT service. Youth, Music and English Entertainment portfolio of Viacom18 consists of category leading channels like MTV, MTV Beats, Vh1, Comedy Central and Colors Infinity.

## "VOOT SELECT" COMPLETES A YEAR - FASTEST TO 1 MILLION ACTIVE PAYING SUBSCRIBER MARK IN LESS THAN A YEAR



Launched with the brand promise of 'made for stories' that are differentiated and compelling, Viacom18's premium SVoD offering VOOT Select has emerged as the fastest growing Indian OTT platform to hit a landmark milestone of one million active direct

paying subscribers in less than a year of launch. The newest kid on the block has in a short period of time emerged as a formidable game changer by creating disruptive and innovative viewing experiences through fresh stories and category defining initiatives. Digital first strategies like 24 hours before television windowing of network content, high decibel immersive experiences, International content and multi award winning originals have all been growth drivers for the platform. Adding to the content diversity, Voot Select will also be the new home to Showtime content in India and the exclusive destination for upcoming Paramount+ shows in the country. The diverse repertoire of international content will include much awaited titles such as Dexter (Limited Series), Ray Donovan Feature-Length Film, The First Lady from showtime and Frasier (Reboot) & Why Women Kill S2 from Paramount+ amongst others, expected to premiere on the platform in India.

Despite being launched at the cusp of the global health crisis, Voot Select has delivered a phenomenal first year. In an industry first innovation, the brand took their digital-first strategy a step ahead on the back of originals, Before TV content and multi genre international offerings. With content available 24 Hours before TV, access to 24 Hours Live channel of Bigg Boss and producing pandemic-based fiction thriller series 'The Gone Game' – the first series in the category to be shot during the lockdown, Voot Select drove high engagement throughout the year. The award-winning line up of originals like the breakthrough series Asur that emerged amongst the top 3 shows of 2020, Illegal, Raikar Case, Marzi, and Crackdown amongst others added to the diverse content experience of viewers on the platform.

With strengthened tech partnerships and more than 40 per cent of watch time on Smart TVs, the platform has attracted a cohort of premium customers, providing them with an enhanced viewing experience. ■

## 3SS' TECHNOLOGY REACH TO DOUBLE IN 2021

3SS (3 Screen Solutions), leading provider of software solutions for set-top boxes (STB) and multiscreen entertainment, announces that it is on track to see its worldwide technology reach double in 2021 compared with its end-2020 market penetration.

With eight next-generation Android TV projects currently being delivered for major operators in EMEA, North America, Latin America and Asia Pacific, many of which are yet to be announced, 3SS' committed deployment pipeline will total at least 25 million homes by end-2021. This is more than a twofold increase on 2020's 10 million deployed homes total.

"The Android TV OS is now truly mainstream, and operators around the world are building their next-generation TV offerings on it," said Kai-Christian Borchers, Managing Director of 3SS. "We are extremely proud that so many have chosen our 3READY Product Framework, in particular the 3READY Custom Launcher enabled by Android TV Operator Tier, to help them create hybrid and OTT entertainment services people really love."

The 2021 doubling of the potential universe of homes powered by Android TV OS and enriched with world-class user experiences via 3SS innovations is made up of several elements. It includes ongoing progress in active EMEA deployments – such as for Proximus, Com Hem (Tele2) and Allente (formerly Canal Digital) – along with others which will go live in the coming weeks. Also, there are additional recently acquired as-yet-unannounced customer projects.

An important factor contributing to 3SS' 2021 expansion forecast is seven new smart TV projects underway, supporting Samsung Tizen and LG webOS, based on 3READY.

Pierre Donath, Chief Product and Marketing Officer at 3SS, explains: "More and more operators are striving to deliver completely unified experiences, beyond that of the STB; today they are fully embracing smart TV, web and mobile with the goal to provide harmonious, all-encompassing entertainment across devices and viewing contexts." The 3READY Control Center, which enables real-time UX optimization of all apps, all manageable from one unified location, is helping operators achieve this objective in a streamlined, efficient way.



3SS' track record in major international Android TV deployments is unmatched. 3SS delivered the world's first major Android-based deployment, Swisscom TV 2.0, in 2014, since updated to Swisscom TV OS4. Canal Digital OnePlace and Com Hem TV Hub followed in 2018, based on multiple award-winning 3READY. More operators decided to build their products on 3SS technology in 2019,

including Uruguay's TCC and Belgium's largest service provider, Proximus. In February 2020, it was announced that Norway's Altibox is deploying 3READY to enhance its upcoming Android TV service.

The company's growing worldwide reputation, which includes 14 prestigious industry awards principally recognizing the superior UX quality of its deployments, is not the only catalyst influencing 3SS' anticipated footprint growth.

The 3READY Entertainment Ecosystem was created to empower operators to rapidly design and launch superior experiences on all devices and enable customer-centric innovation. It is an all-in portfolio of complementary capabilities, technical deployment options, key vendor partnership network and pre-integrations. 3SS' core goal with the Ecosystem is to enable operators and broadcasters to focus on achieving business objectives earlier and create superior experiences when developing their next-generation entertainment products.

Operators have the flexibility to co-define, co-design and co-develop to meet their roadmap needs. Meanwhile they have the means to deliver churn-resistant TV products that exceed the expectations of subscribers. Next-level video services are made possible through deep complementary technology integrations with close partners on top of open and modular 3READY Product Framework architecture. Time-to-market is accelerated, free from vendor-lock-in, with maximum flexibility and transparency.

Importantly, when working with 3SS, operators benefit from agile development techniques which infuse all of the company's operations. Embracing principles such as SAFe (Scaled Agile Framework) results in faster, high-quality system deployments, superior levels of efficiency in product development, as well as engaged, highly motivated individuals and teams.

With agile methodologies, in the 3READY Entertainment Ecosystem – with over 12 operator customers and over 60 technology and content partners to date – development is continuous. Testing and quality assurance operations take place simultaneously, and projects benefit from a high level of extended team communication, so deployments are faster and service launches accelerated. ■





# ANIMATION AND VFX SURGE

*Animation/VFX studios witnessed a surge in content demand for domestic shows, which is expected to rise further over the next few years.*

## Demand for content from OTT platforms increased

COVID-19 caused a surge in OTT content consumption, driving up the demand for OTT content across platforms, which turned to 2D and 3D animated content to fill gaps in live content. It was a year when global players such as Amazon Prime Video and Netflix signed exclusive content licensing deals with various studios in India.

## Demand for domestic animated content grew

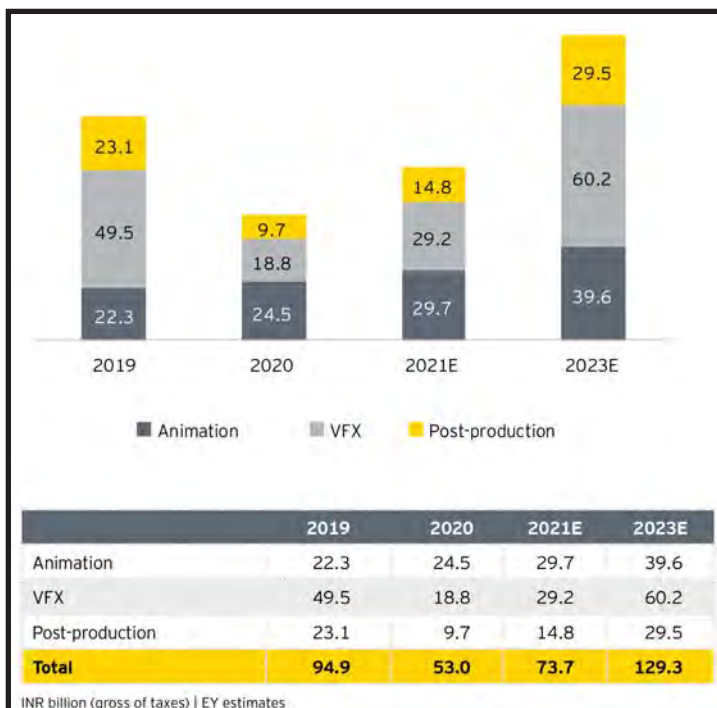
Animation/VFX studios witnessed a surge in content demand

for domestic shows, which is expected to rise further over the next few years.

content for global consumption are also increasing, allowing for higher quality content and subsequently greater global reach. IP development has opened new doors for Indian studios who were traditionally service oriented, as OTT platforms are allowing international audiences to consume such content.

## Technology continued to evolve

Animation, VFX and post-production are gradually adopting AI/ML technologies to streamline workflows and fuel content development. The transition to the work from home model during the pandemic has accelerated adoption, as many studios turn to virtual production to fulfil their needs. Even as restrictions open up, some of these



virtual technologies are here to stay. It is expected that over the next five years, 20%–25% of Indian studios would have adopted such technologies

### **Captive centers increased in India**

International studios are becoming more interested in either opening their own studios in India or investing in existing Indian companies. This is bringing not only investments in, but also adding to the creative and technological talent pool in India

### **Theatrical slowdown impacted VFX**

While animation continued to grow despite the closure of cinemas and postponement of theatrical shoots, live-feed reliant industries like VFX and post-production experienced major setbacks in the first half of 2020. However, shoots resumed relatively quickly in India compared to other countries, allowing the segments to gradually recover over the second half of the year

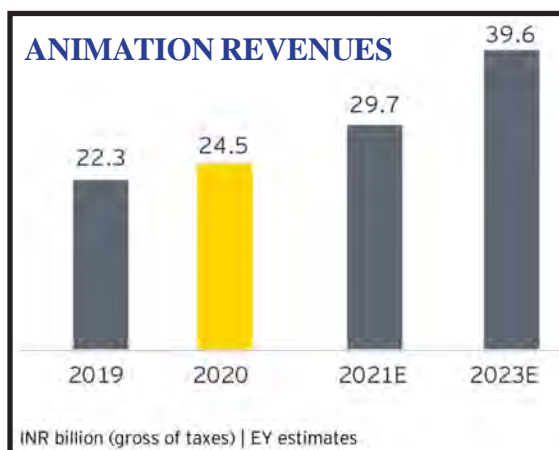
### **Growth prospects are linked to content production revival and more**

Overall, the animation, VFX and post-production segment has deeply felt the impact of the pandemic in 2020. Animation displayed its resilience, bouncing back within a few weeks to meet content demands, albeit while experiencing losses in productivity. VFX and post-production were far more severely affected, halving in value over 2019. Yet, the way forward is optimistic, as piled-up work, growing demand and technology adoption will allow these segments to experience tremendous growth, apart from the need to create digital experiences across different sectors. The segment will grow at a CAGR of 34.6% over the next

three years, collectively reaching INR129 billion by 2023. VFX and postproduction are set to recover to 2019 revenues by 2022.

### **ANIMATION**

Animation remained relatively resilient to COVID-19.



The animation segment successfully catered to the rising OTT demand despite pandemic restrictions by quickly adapting to the work from home model and managing a 10% growth in 2020 to reach INR24.5 billion.

With the sudden imposition of lockdown, several studios faced productivity gaps in March and April, bouncing back to 60%-70% of deliveries by June and eventually recovering fully by late August.

Productivity gaps in the first few weeks were caused by low internet speed, insufficient bandwidth and complex software requirements, but these were quickly overcome.

While larger studios experienced growth on the back of their ability to adapt and adjust to pandemic restrictions, smaller studios struggled and some even shut down.

Animation studios are now replete with overseas and domestic work till 2022-23.

Earlier, Indian animation studios

were largely dependent on content sales to international markets but now, growth is being driven by domestic original content.

Studios have transitioned from being content developers to IP owners.

### **The Kids OTT Genre**

COVID-19 has contributed to a significant rise in children's consumption of animated content:

- ❖ According to BARC, there was a 39% growth in consumption of children's content during the lockdown

- ❖ Share of children's genre increased from 6% of total television viewership in 2019 to 7.4% in 2020

OTT platforms, too have seen success with their kids programming:

- ❖ Toonz Media Group launched MyToonz, is a kids OTT platform. It tied up with multiple app stores, telcos, OTTs and connected TV companies around the world to make MyToonz available for consumers across platforms; the MyToonz library will launch with over 1,500 half-hours of content that are targeted at preschoolers, upper preschoolers and early teens.

- ❖ Discovery+, the subscription-based video streaming service owned by factual entertainment network Discovery, introduced a genre devoted to kids content, with the launch of a show from the Little Singham franchise, modeled on the popular Bollywood film

- ❖ ZEE5 launched ZEE5 kids with over 4,000 hours of free content across genres in nine different languages.

- ❖ YouTube kids and Voot kids were the other dedicated kids OTT platforms in India.

## Domestic Broadcasters Commissioned More Original Animation Content

Broadcaster	Channel	Show	Launch month	Description
Disney	Disney Channel	Bapu	May 2020	This show was launched to instill in children the teachings of Gandhiji in a fun but responsible manner
Turner International India	Pogo	Titoo	Jul 2020	A comedy that follows the daily escapades of eight-year-old Titoo, a good-hearted, intelligent kid who loves to help everyone, but inadvertently manages to brew even more trouble
Turner International India	Pogo	Lambuji Tinguji	Nov 2020	A slapstick buddy comedy, it explores the funny escapades of the inseparable eponymous duo in Buddy Badi Valley
Viacom18	Nickelodeon Sonic	Ting Tong	Sep 2020	Nick's 9th IP Ting Tong aims to bring alive short, snacky and exciting drama for kids
Turner International India	Pogo	Smashing Simba	Nov 2020	Pogo launched Smashing Simba which is an animated version of Rohit Shetty's recent blockbuster Simmba
Turner International India	Cartoon Network	Bandbudh Aur Budbak	Since 2015	Acquisition of library content (156 episodes) of Badrinath and Budhdeb, two best friends who create adventurous memories by getting in a lot of trouble at school

## VFX and POST-PRODUCTION

VFX and post-production were heavily affected by disruption to the

live action industry, especially during the first two quarters of 2020 and fell from INR72.6 billion in 2019 to INR28.5 billion in 2020.

Policies and procedures implemented due to COVID-19 led studios to resort to Chroma shoots and pre-visualization of sequences to minimize the actual time spent on sets.

There was a reduction in pipeline of projects in the short term with many films

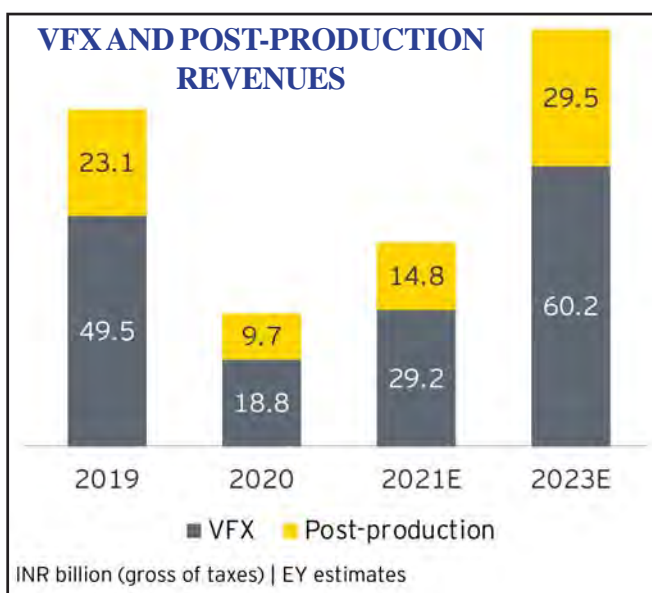
indefinitely delayed which led to layoffs and salary cuts; many permanent employees were made temporary.

VFX and post-production being largely creative and collaborative processes, hence, a complete shift to the work from home model hampered the learning and development of newer employees.

Small studios (employee base of 10-30) were slower than larger ones in transitioning to remote working, in some cases taking one and a half months to return to full service; many of these studios went out of business, leading to more freelancers entering the market.

## The Road to Recovery

Over Q3 and Q4 of 2020, the VFX segment displayed resilience and recovered as live shoots and feeds resumed and an effective work from home pipeline emerged.





Companies turned to virtual production and the Unreal Engine gained traction, with studios experimenting with in-camera visual effects using LEDs as a backdrop.

The pile up of VFX work over the past fiscal year will lead to lots of high pressure and high volume work in 2021, which in turn will lead to diversification of the industry with small and medium studios emerging again to absorb some of the load on larger players.

This will increase employment, in addition to increasing the ability of Indian people to pitch for global projects in future.

Bollywood increased its demand for big-budget VFX productions

Today, up to 20-25% of the production cost on a movie is spent on visual effects as compared to the past, where VFX accounted for less than 10% of the total film production budget.

“Gunjan Saxena” used VFX to deliver the real-life story, struggles and gender-based discrimination faced by former Indian Air Force pilot Gunjan Saxena.

The success of “Tanhaji The Unsung Warrior” has prompted another VFX-heavy project titled “Adipurush”, which is speculated to be an adaptation of the Indian epic Ramayana.

### **Outsourcing of work from developed countries increased**

Overseas clients are starting to shift outsourcing away from China, which could benefit Indian VFX studios.

Developed countries outsourcing VFX projects to low-cost ones have been significantly on the rise.

India is the world leader in VFX outsourcing of Roto and Prep, as well as a preferred destination for outsourcing VFX work due to high

currency conversion ratios, which enables companies to save about 30-50% of their VFX budget in addition to India's inexpensive massive bandwidth of creative and technical skilled artists.

### **OTT platforms demanded more VFX**

VFX studios have benefited from the growth in higher-than-television quality content being produced for OTT platforms as well as the growth in hours of such programming, which peaked in 2019 at around 1,800 hours as per our estimates.

They expect this trend will continue and the segment should benefit from increasing demand for higher quality content with larger budgets from OTT platforms, in addition to a growing TV and film services business.

### **The segment can play a larger role in India's US\$5 trillion GDP ambition**

### **Government initiatives in the animation and VFX segment**

The central government has always supported the segment and some of the key initiatives announced include:

The National Center of Excellence has entered an understanding with the Indian Institute of Technology, Bombay to provide courses in AVGC.

India will set up a special pavilion at Cannes in 2022 as the Cannes Film Festival celebrates 75 years as well as host a Global Media and Film Summit

The government raised the FDI limit in animation, VFX and post-production to 100% through automatic route which is expected to open new avenues for investment, growth and job opportunities

Various state governments have also undertaken initiatives to boost this segment:

- ❖ Growth in Karnataka is being driven by the government of Karnataka's strategic offerings to collaborate and build world class infrastructure.
- ❖ The Maharashtra government has sanctioned 20 acres of land for an AVGC training institute in Goregaon Film City premises and it is also coming up with its first Maharashtra Film, Media and Entertainment Policy.
- ❖ The IMAGE Tower was built by Salarpuria Sattva in collaboration with the Telangana government to cater to the AVGC sector.

However, further government incentives and policies are needed for increased competitiveness and to enable recovery of the segment<sup>12</sup>:

The government could consider signing more co-production treaties, develop a mechanism of implementation of these treaties in India in addition to creating a co-production fund to support studios in India.

Develop programs or channels like “Doordarshan Kids” as a public broadcaster for animation in the market as this genre has a very strong potential and lacks a medium for the masses.

The government can consider recognizing Animation, VFX and post-production IPR as legitimate property that can be valued and used as collateral for funding investment and growth of studios.

Consider providing various tax credits and quotas on domestic content to help make the segment more competitive, at least to the extent being provided by other countries, to encourage increased outsourcing of work to India as well as incentivize animation companies to create indigenous content out of India which IPR can travel globally for years and generate revenues. ■

**Source: EY FICCI M&E Report 2021**



# TOP VFX & POST PRODUCTION STUDIOS IN INDIA

*The entertainment ecosystem in India boasts of an impressive infrastructure of post houses, vfx studios which deliver quality work. Broadcast & Film has profiled some of the leading VFX & Post Production Studios in India.*

## Redchillies.vfx

Redchillies.vfx, a division of Red Chillies Entertainment, is an award winning Visual Effect company founded by Bollywood actor Shah Rukh Khan, along with Keitan Yadav (COO) & Haresh Hingorani (CCO).

SRK's vision for creating a world class studio came into establishment in 2006. redchillies.vfx envisioned a desire to make photo-realistic animation and premium visual effects technology available for feature films.

Within 13 years of its existence, redchillies.vfx has established itself as one of India's top Visual Effects Studio.

Embarking on their 14th year as a vfx Division Unit, rcvfx has had the opportunity of not only working on benchmark / vfx Indian movies, but also International movies in this time frame. The company has carved a niche in the film industry and it's repertoire of work includes avant-garde graphics

in renowned blockbuster films like Chak De! India (2007), Ra.One (2011), Krrish 3 (2013), FAN (2016), Phillauri (2017), and the upcoming Zero (2018).



**redchillies.vfx**  
www.redchilliesvfx.com



Relocated recently to a newly opened state of art facility in Goregaon West, Mumbai of 25,000 sq. ft, the set

up includes the latest technology, infrastructure as well as a Color Grading & International vfx division.

Redchillies.vfx is equipped with technically advanced storage facility that has the capacity to work on multiple visual effects film projects at the same time.

The data center comprises of 3200 cores of rendering power with an estimated 8.3 THz of computing power. The studio has a heterogeneous OS environment with Linux, Mac and Windows powered by high-end workstations with superior Nvidia Quadro GPUs. Basically, we are even equipped to go to war!

The software and tools that we have developed are the new age weapons to beat all the cinematic limitations and develop stylized motion graphics.

Redchillies.vfx has a strong R&D team that constantly strives to develop cutting-edge tools, advanced techniques and new generation technologies. And combine

them with award winning third party applications that are used in our workflow.

These tools assist us in completing multiple projects simultaneously without compromising on the schedule and quality standards.

### Prime Focus



Prime Focus Limited is a world renowned independent full-service media player. The Company enjoys a strong leadership position in all the three verticals it operates in, creative services (visual effects, stereo 3D conversion and animation), tech/tech-enabled (CLEAR, Media ERP Suite and Cloud-enabled media services), and Indian Film and Media services (FMS) (visual effects / DI, color grading, equipment rental, digital intermediate, picture post). Its operations are spread across 19 cities in 5 continents covering 7-time zones with a team of over 10,446 professionals. The Company is recognised on the Fortune India 500 list.

Prime Focus, the world's largest integrated media services powerhouse, employs over 5,500 professionals in 16 cities across 4 continents and 7 time zones. We provide end-to-end creative

services (visual effects, stereo 3D conversion, animation), technology products & services (Media ERP Suite and Cloud-enabled media services), production services (shooting floors/sound stages, equipment rental) and postproduction services (Digital Intermediate, sound, picture post) to Studios, Broadcast and Advertising industries.

Prime Focus is behind path breaking technologies like CLEAR™ (Hybrid Cloud technology enabled Media ERP Suite), Primetime Emmy® award-winning DAX Digital Dailies® and View-D™ (stereoscopic 2D to 3D conversion process).

Leveraging our Global Digital Pipeline and pioneering delivery model WorldSourcing® we partner content creators at every stage of the



process ensuring creative enablement, work flow efficiencies and cost optimization. In mid-2014 Prime Focus Technologies acquired DAX, a leading provider of cloud-based production workflow and media asset management applications; Prime Focus World merged with Double Negative, one of the world's foremost providers of visual effects; and Reliance MediaWorks merged their global film and media services business with Prime Focus Limited.

Listed on the BSE and NSE of India, Prime Focus has operations in Bangalore, Beijing, Cape Town, Chandigarh, Delhi, Goa, Hyderabad, Johannesburg, Kolkata, London, Los Angeles, Mumbai, New York, Singapore, Toronto and Vancouver.

### Future Works Media Ltd



Leading global content creators, studios and OTT's rely on FutureWorks expert artists and technologists to deliver world class services. FutureWorks is a leader in end to end film production, from visual effects and picture-sound post production, to the supply of high precision cameras and lenses. With a dedicated team of over 300 talented artists, spread across multiple integrated facilities in India, FutureWorks is recognised as a trusted partner by platforms worldwide.

### Prasad



Prasad Corp is one of the largest, totally integrated digital post production services provider incorporating the latest technologies with the finest infrastructure.

A pioneer in film and video post production, we offer the entire range of digital services including Digitization of Film and Tape, Digital Film Restoration, Digital Archiving, Media Asset Management, VFX, Rotoscoping, Digital Intermediate,





Remastering, Up-Conversion and 3D Movie Production Solutions. The projects served by us include Academy Award Winners, Golden Globe Award Winners and several other National and International Award Winners. dft has been at the forefront of film scanning technology for over 75 years providing solutions for film post-production, archive and restoration markets with a range of high quality, leading-edge products and services.

Film scanning has been at its DNA. Over the years dft's telecines, datacines and film scanners have been at the heart of post-production, enabling facilities around the world to get high-quality images for their motion film projects. Through its sustained research and development investments, dft has evolved and launched some of the most technically advanced scanners today – standing the test of time.

### Makuta

Makuta is a fully-fledged visual effects facility covering a full gamut of requirements from active on-set visual effects supervision through to immersive digital set extension, digital matte painting, high-end feature animation and

effects work, clean-up, motion tracking and final compositing.

They have the backbone support of state of the art systems, a large dedicated render farm which is expanding all of the time, high capacity storage, off-site backup, with high-speed FTP with dedicated connection for transferring digital assets.

They are continuously expanding, even having to relocate offices within the first 18 months of running

and have now branched overseas with our parent company Makuta Incorporated being founded in the USA and with staff located worldwide.

Although they have only been around for a few years, we have grown from a small fledgling to an

# MAKUTA



internationally-recognised studio which has a lot of bang for its buck. In the past few years we have heavily invested in our core artistic talent development along with software and hardware infrastructure and have worked on some of the most prestigious features within the Indian film industry with acclaimed directors such as SS Rajamouli, AR Murugadoss, Bapu and Shank

**yFX**



yFX is the newly formed visual effects facility at YRF Studios. Started in 2016 by a core group of experienced, skilled and award-winning VFX supervisors, technical directors, and artists, this state-of-the-art studio offers film makers a one-stop shop; a creative 'think tank', where every aspect of film making is addressed under one roof... from script to screen!

Capabilities include 3D asset build, animation, matte painting, compositing, and visual effects. Technology is state-of-the-art: Maya, Houdini, Nuke, and Flame pipelines, with high-speed servers, and a large render farm.

yFX's first major project was visual effects for the Salman Khan starrer SULTAN - CGI virtual sets,



crowd multiplication, both 3D and live, and digital prosthetics, formed a large portion of the over 2000 vfx shots delivered for SULTAN.

Apart from delivering 3D animation and visual effects for the feature film, television and advertising industries, yFX has strong capabilities in the newly developing augmented (AR) and virtual reality (VR) areas as well.

YRF was founded by the Late Yash Chopra, a veteran of the Indian film industry, in 1970. It's the only privately held and fully integrated studio in India producing and having produced over 80 films. YRF is now a 50-year-strong production house and a vertically integrated studio in every sense, controlling almost every part of the value chain from production to post production, domestic & international distribution, music & home entertainment, marketing, design, digital, licensing, merchandising, talent management, brand partnerships, music studios and film studios - all in-house facilities, which make it one of the most coveted entertainment conglomerates in the country.

YRF has its own state-of-the-art fully integrated studio that houses shooting stages, sound studios and is headquartered at one of Mumbai's prime properties where the heart of the entertainment business beats.

Over the last five decades, YRF's catalogue of films could be easily

India's most enviable film catalogue in the entertainment business. YRF's top grossers have already placed the company in the big league of producers worldwide, making it one of the largest film-making entities in the nation.

### Moving Picture Company



Moving Picture Company is a global creative studio with a single goal: to create experiences that move people. With decades of storytelling

experience, they understand the true power of embracing innovation to push the boundaries of creation. MPC started out in 1970 as a production company in London producing television commercials. Today, we have creative studios all over the world – London, Los Angeles, New York, Amsterdam, Paris, Shanghai and Bangalore. Since inception, they have constantly been a pioneer of creativity and technology, doing things that have never been done before and creating experiences that are truly unforgettable. This couldn't be truer than with their character and creature work throughout the years. Everyone remembers Cadbury's drum-playing gorilla who captured the nation's hearts with his raw emotion, or Three's plucky Shetland pony that moonwalked its way into superstardom. ■





# TOP OTT PLAYERS AND THE THEIR FINANCIAL RESURGENCE IN THE PANDEMIC

*The year gone by i.e., 2020 has hit the entertainment sector badly due to the pandemic and the repercussions will be felt this year also. The OTT players have registered phenomenal growth in the pandemic in terms of revenues and addition in subscribers.*

*We have tried to profile some of the top OTT players and catalogue their financial performance during the Covid pandemic.*

Over-the-top media services (OTT) platforms have become quite popular in India since last few years. An over-the-top (OTT) media service is a streaming media service offered directly to viewers via the internet. OTT bypasses cable, broadcast, and satellite television platforms, the companies that traditionally act as a controller or distributor of such content. Due to COVID-19 outbreak in the country, many filmmakers are now releasing their movies on major OTT platforms, instead of waiting for the theatres to re-open. India has lots of options when we talk about OTT services. Here are the Top 10 OTT platforms in India.

## Amazon Prime Video

Amazon Prime Video is a very popular video streaming service or OTT service in India. Amazon Prime Video was launched in 2016 in India. Besides English, Prime Video is available in six Indian languages as of December 2018. Amazon India



launched Amazon Prime Music in February 2018. You can join Prime to watch the latest movies as well as award-winning Amazon Originals at ₹ 129/month or ₹ 999/year. Prime subscription presently also includes free Amazon music alongside unlimited free, quick delivery.

## Netflix

Netflix is one of the popular streaming services in India. The OTT platform offers three subscription plans including Basic, Standard HD and Premium Ultra HD. The Basic plan comes with a price tag of ₹ 500, while the Standard HD pack is priced at ₹ 650 and the Premium Ultra HD plan is available for ₹ 800 per month.

Netflix faces tough competition with other OTT platforms in India such as Amazon Prime, Hotstar, Voot and Eros Now, each of which charge lower subscription rates than Netflix.



*(Netflix has reported significant growth in India revenue from IN₹ 58.04 Cr in FY2018, to IN₹ 470 Cr in FY2019 and then IN₹ 900 Cr in FY2020. India falls in the Asia Pacific region for the US-based company, which was the second-largest contributor to the yearly tally with 93 Lakh new subscribers in 2020. The company had added a record 3.7 Cr paid memberships in last year. The company had also offered a two-day free streaming offer in India, which led*



to 8 Lakh downloads of the Netflix app..)

## Disney+ Hotstar

Disney+ Hotstar is an Indian over-the-top streaming service owned by Novi Digital Entertainment, a subsidiary of Disney's Star India. It features two paid subscription plans— "VIP", which focuses on domestic programmes and sports content (including Indian Premier League cricket), and "Premium" featuring premium international films and television series (including HBO, Showtime and other American original series).



As of July 2020, VIP Plan costs ₹ 399 for a year and Premium Plan costs ₹ 1,499 per year or ₹ 299 for a monthly plan. As of March 2020, Disney+ Hotstar has at least 300 million active users.

Disney+ Hotstar has reported a revenue of IN ₹ 1628 Cr for FY2020, with losses narrowing in comparison to the previous year.

The company saw relatively slower growth in subscription revenue for FY20, in comparison to over 50% growth in ad revenue.

According to a recent study, Disney+ Hotstar could become the second-highest revenue-earning video platform in India by 2025.

However, it is difficult to predict whether Hotstar will be able to keep up with the revenue growth in FY2021, ending in March 2021. The company,

in its financial statement, has claimed that its operations were hit during the pandemic due to health in sporting events worldwide. The pause on the shooting of shows between March 19 to July 13, 2020, also impacted the company's revenues.

While Hotstar claims that since the easing of restrictions, the production of shows has resumed and many have released on the platform, it added the impact from the pandemic will be assessed on an ongoing basis.

## Voot

Voot is an Indian subscription video on demand (SVOD) service. Launched in March 2016, it forms the online arm of Viacom 18. It is Viacom 18's advertising-led video-on-demand platform that is available as an app for iOS, KaiOS (JioPhone) and Android users, and a website for desktop consumption. Voot Select will cost ₹ 99 a month after a three-day free trial, or ₹ 499 for the full year after a 14-day free trial.



Voot is available only in India, and hosts over 40,000 hours of video content that includes shows from channels like MTV, Nickelodeon and Colors. Content is also available in multiple languages like Kannada, Marathi, Bengali, Gujarati, Telugu and Tamil. Voot has content from Colors TV, MTV India, Nickelodeon India and other Viacom 18 owned television channels. It also hosts many Bollywood films for streaming. It has produced several 'Voot Original' shows for streaming as well.

In February 2020, Voot

introduced paid subscription service called Voot Select. Voot Original series are made available only to paid subscribers. Some TV shows are being streamed a day before TV for its paid subscribers.

Its freemium service Voot Select was launched this quarter. ₹ 13 crore was invested into Voot Select and Kids (and in Kannada and Gujarati movie channels). Operational revenue from "digital, print, others and & intercompany elim." fell 16.6% QoQ and 20% YoY to ₹ 40 crore. Now Viacom18's Voot expects 50% revenue from new subscription-led service Voot Select. Earlier, it used to be all free. It was just an ad-supported platform.

Voot has 100 million monthly active users and aims to be one of the leading Indian OTT players. Currently driven by an Advertising supported video-on-demand model, Voot will continue to build scale by diversifying from 1 business model of AVOD to 4 - VOOT AVOD, VOOT Kids, VOOT International and VOOT Freemium. With the freemium model, Voot plans to invite more first-time users, and give them a preview of their original, exclusive content. The monetization and revenue plan will largely be advertisement driven, but premium services for pay-per-view subscribers will also bring in money. "The current digital advertisement market is around ₹ 1,200 crore and will push up to ₹ 6,000 in the next 2-3 years. We hope to exploit that," Gandhi said.

## ZEE5

ZEE5 is an Indian video on demand service run by Essel Group via its subsidiary Zee Entertainment Enterprises. It was launched in India on 14 February 2018 with content in 12 languages. ZEE5 recently announced the launch of 'ZEE5 Club' at ₹ 365 per year. ZEE5 Club

will enable its consumers to have exclusive access to most popular shows before telecast on TV, apart from select ZEE5 and Alt Balaji shows, - 1000+ blockbuster movies, ZEE Zindagi shows and over 90+ Live TV channels.



With ZEE5 Club, subscribers will be able to enjoy entertainment content without any intrusive ads and across devices. Some of Zee's popular TV shows like Kumum Bhagya and Kundali Bhagya in Hindi, Sembaruthi in Tamil, Jothe Jotheyali in Kannada and Mazya Navryachi Bayko in Marathi and many more would be now available on ZEE5 Club before telecast on Television.

Zee5 had 54.7 global million monthly active users (MAU), and 5.2 million global daily active users (DAU) in the September 2020 quarter, the MAUs and DAUs stood at 65.9 million and 5.4 million respectively in December 2020. Genka shared that the lack of TV content during Q1 impacted the conversion of active users as a large part of the "funnel" to add users was TV catchup content.

The company will not invest any capital in MAU-DAU conversion and it is going to be largely based on the catch-up TV portfolio. Zee5 will target 15-18 per cent conversion of MAU to DAU in the next fiscal.

The video streaming service released 18 original shows and two

movies during the quarter. However, the average watch time per user per month was 152 minutes in Q2 has slid to 133 minutes in the third quarter. While an investor pointed out that the engagement is lagging compared to other platforms with similar content, Goenka said that the low performance of some linear TV shows of the network has impacted the catch-up TV consumption, leading to lower engagement.

Zee5 revenues were at 117.8 crore, up 19 per cent quarter-on-quarter, while EBITDA loss was at ₹ 175.7 crore versus ₹ 189.4 crore in Q2. The EBITDA losses continue due to higher investment in content.)

## Sony LIV



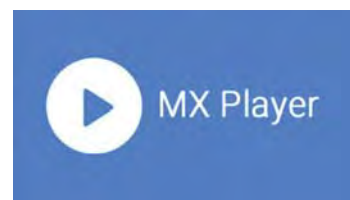
Sony Liv (marketed as SONY LIV and formerly as SonyLIV) is an Indian general entertainment, video on-demand service that is owned by Sony Pictures Networks India Pvt. Ltd., based in Mumbai, Maharashtra, India. Sony Liv's Library consists of 18 years of content from the Sony Entertainment Network channels in India: Sony TV, Sony SAB, Sony Ten, Sony Max, Sony MAX 2, Sony PIX and Sony Six.

Sony Liv is the first Indian Over-the-top media service platform to produce music content for a Hollywood feature film - producing music for the Hindi version of the blockbuster titled Passengers,

starring Chris Pratt and Jennifer Lawrence.

Sony Liv Premium subscription costs you ₹ 299 per month, ₹ 699 for six months, and ₹ 999 per year.

## MX Player



MX Player is an Indian video streaming and video on demand platform developed by MX Media & Entertainment. It has over 280 million users globally. The platform currently operates on an ad-supported model and has a streaming library of over 150,000 hours across 12 languages. It is available on iOS, Android and the web. The online Feature of MXPlayer is available absolutely free of cost for our users to explore.

In 2018, Times Internet acquired a majority stake in MX Player for \$140 million. On 20 February 2019, MX Player was relaunched as an OTT platform with original programming. It has licensed contents from various Indian and International studios including FilmRise, Sonar Entertainment, Screen Media Films, Goldmine, Hungama, Shemaroo, Paramount Pictures and Sony Entertainment.

## ALT Balaji

ALTBalaji is an Indian subscription based video on demand platform which is a wholly owned subsidiary of Balaji Telefilms Ltd. ALTBalaji is available across 32 different interfaces for its viewers. The content has been made available on mobile and Tablet Devices (Apple phone, Apple iPad, Android phone,

Android tablet), Web browser (Desktop Browser), Android TV, and Windows (Windows PC, Windows Mobile, Windows tablet).



Their website claims the platform to be the largest content bank seen in India. The stories range from drama, comedy, and romance, to thriller, crime, and mystery. The content bank also includes 100+ hours of kids' content as well as urban regional shows in Bengali, Hindi, Marathi, Punjabi, Tamil & many more languages. You have a choice of three streaming membership plans - 3 months for ₹ 100, 6 months for ₹ 180 or 12 months for ₹ 300.

*(ALT Balaji's COVID-19 related subscription spike has flattened, as Balaji Telefilms's revenues from the streaming service declined from ₹ 22.2 crore in the preceding quarter to ₹ 14.9 crore in Q1FY21. According to the company's management, ALT Balaji has a churn rate of around 66%, which means that two thirds of subscribers generally don't purchase new subscriptions when theirs have run out.)*

### Eros Now

Eros Now is an Indian subscription based over the top, video on-demand entertainment and media platform, launched in 2012. It is owned and controlled by Eros Digital, the digital media management arm of Eros International plc. The network offers

media streaming and video-on-demand services. The digital platform is accessible on most Internet-connected screen including mobile, tablets, web and TV.



The platform has blockbuster films like Cheeni Kum, Happy Bhag Jayegi, Manmarziyaan, Bajirao Mastani, Tanu Weds Manu Returns, Goliyon ki Raasleela Ram-Leela, Rockstar, Shubh Mangal Savdhan and more. Eros Now also has web-series and films like A Monsoon Date, Maunn, Salute Siachen, Black & White interviews and more in their segment called E- Buzz. The subscription cost of the Eros Now Premium subscription service is ₹ 99 per month for a single device and ₹ 399 per year for a single device.

Eros Now Subscribers Grow 56% Y-o-Y to Reach 29.3 Million  
Revenue of \$155.5 Million and Adjusted EBITDA of \$54.8 Million

### Arre



Arre is an Indian OTT platform

based in Mumbai. It produces and publishes videos, audio series, web series, documentaries, text and doodles through its online channel. Founded by former Network 18 and TV 18 executives B. Sai Kumar, Ajay Chacko, and Sanjay Ray Chaudhari, it is a content-based startup and was launched in April 2016.

**OTT market to grow at 26% CAGR and touch \$4.5 billion by 2025 in India.**

MPA report projected the SVoD market will grow by 30% CAGR from 2020 and reach \$1.9 billion by 2025, while AVoD segment is expected to surge over the next five years at a CAGR of 24% to reach \$2.6 billion.

At a time when people are stuck at home due to the COVID-19 pandemic and looking for entertainment options, the overall online video market for India is projected to grow at a compound annual growth rate (CAGR) of 26 percent between 2020 and 2025 to reach \$4.5 billion in revenue over the next five years, says Media Partners Asia (MPA) in its new report titled India Online Video & Broadband Distribution 2021.

According to the MPA's report, India's online video industry generated an estimated \$1.4 billion in revenue in 2020, while advertising and subscription contributed 64 percent and 36 percent, respectively.

Among the top five services which accounted for a combined 85 percent share of total revenues in 2020 include YouTube (43%), Disney+ Hotstar (16%), Netflix (14%), Amazon Prime Video (7%) and Facebook (5%), quoted MPA executive director Vivek Couto as saying.

Couto added that the average number of subscription video-on-demand (SVOD) services subscribed by customers reach 2.8 in India and Southeast Asia.



In its report, MPA projected the SVoD market to grow by 30 percent CAGR from 2020 and reach \$1.9 billion by 2025. However, online video advertising saw a marginal decline of 2 percent year-on-year and reached an estimated \$909 million in 2020 due to decreased demand.

Despite this, the advertising video-on-demand (AVOD) segment is expected to surge over the next five years at a CAGR of 24 percent to reach \$2.6 billion by 2025.

"Subscription-based online video services benefited significantly in 2020 as the country went into the lockdown. Key players are investing in premium local content while leveraging sports, movie rights, and aggressive consumer pricing to drive subscriber adoption. The SVoD market will remain competitive as Disney+ Hotstar scales its direct subscription business while Netflix and Amazon Prime Video deepen partnerships with mobile and fixed broadband operators," the business daily quoted MPA India vice-president Mihir Shah's statement.

MPA predicts Disney+ Hotstar may secure over 80 million subscribers in India if they continue to invest in local originals and retain key sports rights. In 2020, the online channel invested in acquiring big-ticket Bollywood films, following which its subscribers rose to 26.8 million as of December 2020, and

India making up 30 percent of its global subscription base.

Adding more, Shah said that YouTube remains the market leader in AVoD and accounted for 67 percent of total online video advertising in 2020. However, MPA India VP looked sceptical and said that YouTube's market share may decline to 55 percent

"While the direct-to-digital premiere of films is unlikely to sustain, reopening of cinemas will not necessarily impact consumption on OTTs. Streaming services are not just pushing for more originals, the whole experience is also getting modelled for urban-ready homes with technologies like Airtel XStream and Jio Giga Fiber," Shah said.

The latest MPA report claims India's mobile broadband penetration is forecast to grow steadily to 66 percent by 2025 as commercial roll-out of 5G expected to begin in 2021. The new investment by private telcos has boosted India's fixed broadband

market which till now has remained under-penetrated at merely 6 percent of households.

The report further claims of India's fixed broadband market to grow at a CAGR of 18 percent to reach 45 million subscribers with over 82 percent of subscribers through fiber by 2025.

Infrastructure growth has helped Indian customers look for expanded broadband capacity which includes video conferencing, work from home, digital classes, and video streaming.

The MPA provides independent research, advisory and consulting services across media, telecoms, sports, and entertainment industries in Asia Pacific and the Middle East. ■



in 2025 with domestic broadcaster-backed platforms and short-form user generated content video players expanding their base.

"Local premium content and sports rights will help broadcaster-backed platforms gain share. Increased reach and engagement with rural millennials will improve monetisation for short-form video platforms," Shah said.

Among other things, MPA report said that OTT content investment in India touched \$700 million in 2020 as domestic and global platforms continue to invest in India's burgeoning SVoD opportunity. Estimate claims OTT content cost may grow at a CAGR of 18 percent to reach \$1.6 billion between 2020-2025.



# MEDIA & ENTERTAINMENT SECTOR 2020: KEY TRENDS

*The M&E Sector expected to touch INR 1.73 trillion (US\$23.7 billion) in 2021 and then to grow at a CAGR of 13.7% to reach INR2.23 trillion (US\$30.6 billion) by 2023*

The Indian M&E sector fell by 24% to INR1.38 trillion (US\$18.9 billion), in effect taking revenues back to 2017 levels

The last quarter of 2020 showed a marked improvement in revenues for most segments and we expect the M&E sector to recover 25% in 2021 to reach INR1.73 trillion (US\$23.7 billion) and then to grow at a CAGR of 13.7% to reach INR2.23 trillion (US\$30.6 billion) by 2023

While television remained the largest segment, digital media overtook print, and online gaming overtook a disrupted filmed entertainment segment in 2020.

Digital and online gaming were the only segments which grew in 2020 adding an aggregate of INR26 billion and consequently, their contribution to the M&E sector increased from 16% in 2019 to 23% in 2020

Other segments fell by an aggregate of INR465 billion

Indian M&E sector fell 24% in 2020 to INR 1.38 trillion

## INDIAN M&E SECTOR

	2019	2020	2021E	2023E	CAGR 2020-23
Television	787	685	760	847	7%
Digital media	221	235	291	425	22%
Print	296	190	237	258	11%
Online gaming	65	76	99	155	27%
Filmed entertainment	191	72	153	244	50%
Animation and VFX	95	53	74	129	35%
Live events	83	27	53	95	52%
Out of Home media	39	16	22	32	27%
Radio	31	14	23	27	24%
Music	15	15	18	23	15%
<b>Total</b>	<b>1,822</b>	<b>1,383</b>	<b>1,729</b>	<b>2,234</b>	<b>17%</b>

All figures are gross of taxes (INR in billion) for calendar years | EY estimates

Largest absolute contributors to the fall were the filmed entertainment segment (INR119 billion), print (INR106 billion) and television (INR102 billion)

The share of traditional media (television, print, filmed entertainment, OOH, radio, music) stood at 72% of M&E sector revenues in 2020

### Television

The largest segment saw a 22% fall in advertising revenues on account of highly discounted ad rates during

the lockdown months – though ad volumes reduced only 3%. In addition, it also witnessed a 7% fall in subscription income, led by the continued growth of free television, reverse migration and a reduction in ARPU's due to part implementation of NTO 2.0.

## Digital advertising

Digital advertising stayed stable, led by increased allocation from traditional advertisers who accelerated their investments in digital sales channels. This could become a permanent phenomenon. SME advertisers continued to increase their spends on digital advertising and experimented more with online sales platforms like Amazon and Flipkart.

News brands, whose reach crossed 450 million in 2020, also increased revenues from their digital platforms.

## Digital subscription

28 million Indians (up from 10.5 million in 2019) paid for 53 million OTT subscriptions in 2020 leading to a 49% growth in digital subscription revenues. Growth was led largely by Disney+ Hotstar which put the IPL behind a paywall during the year, increased content investments by Netflix and Amazon Prime Video and launch of several regional language products. In addition, 284 million Indians consumed content which came bundled with their data plans.

## Print

Print's revenue declines were led by a 41% fall in advertising and a 24% fall in circulation revenues. English language newspapers were hit harder and struggled to get back their circulation post the pandemic, particularly in metros, while regional language newspapers recovered a

larger portion of their lost circulation. The segment saw the establishment of a new lower-cost operating benchmark, with most print companies reducing costs by over 25%.

## Online gaming

Continuing as the fastest growing segment of the M & E sector for the fourth year in a row, the segment grew 18% helped by work from home, school from home and increased trial of online multi-player games during the lockdown. Online gamers grew 20% to reach 360 million in 2020. Transaction-based

game revenues grew 21%, despite adverse regulation in certain states, while casual gaming revenues grew 7%.

## Film

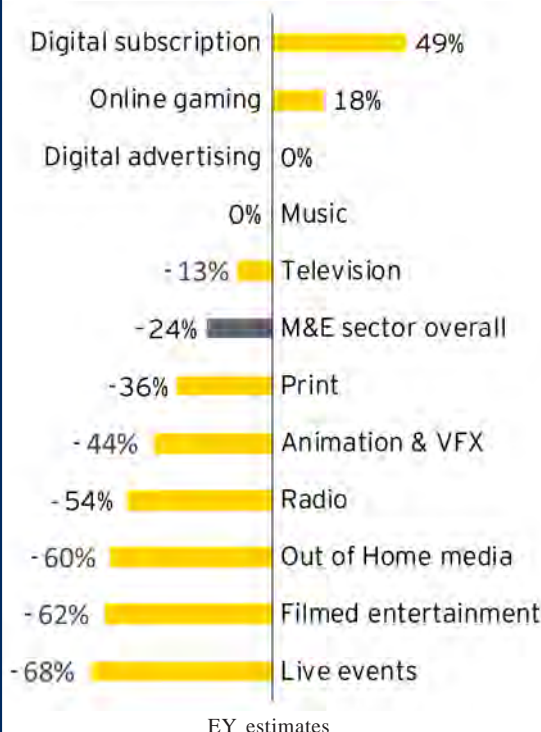
While theatrical

Digital And  
Online Gaming  
Were The Only  
Segments  
Which Grew

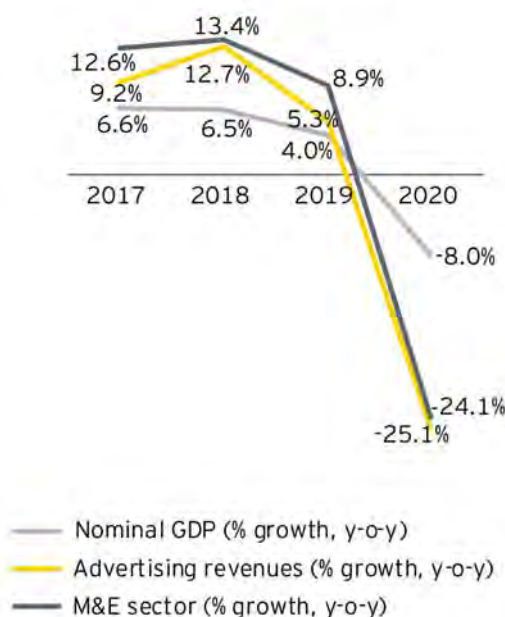
M&E Fared  
Much Worse  
Than India's  
GDP

## KEY TRENDS IN 2020

Segment growth 2020 vs. 2019

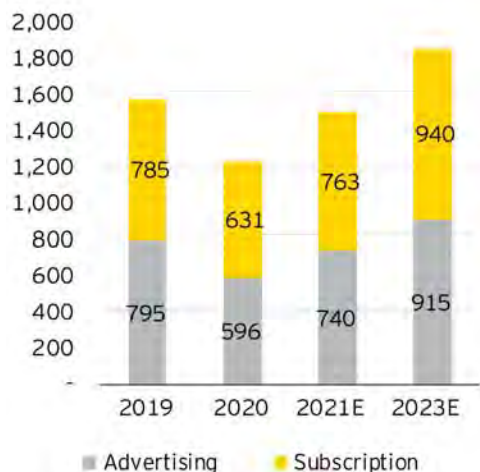


## M&E SECTOR VS. NOMINAL GDP GROWTH





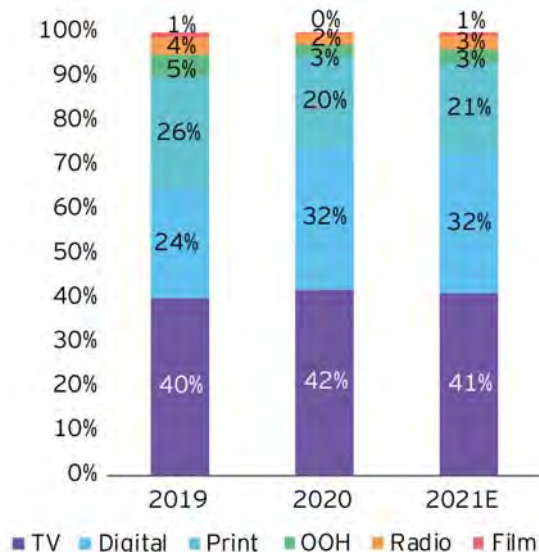
## ADVERTISING AND SUBSCRIPTION REVENUES



INR billion (gross of taxes) | EY estimates

Note: The above numbers exclude live events, online gaming and animation and VFX segment revenues

## AD REVENUES BY SEGMENT



EY estimates | Excludes event segment revenues

revenues plummeted to less than a quarter of their 2019 levels, a portion of this loss was made up through higher digital rights revenues which almost doubled during 2020 to INR35 billion. However, the stoppage in production for over six months had its impact, which will now only recover once a healthy slate of films is made ready for release and the fear of stepping into crowded places subsides. While the trend for direct to digital releases will continue, producers realized the importance of theatrical releases for large scale film productions.

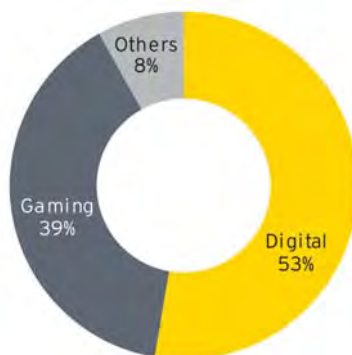
### Animation and VFX

Stoppage of television and film content production for several months in 2020 resulted in a fall in revenues - while VFX and post-production contracted 62% due to this, inability to conduct live shoots led to increased demand for animated content, and consequently animation registered a growth of 10%.

### Live events

Perhaps the hardest hit of all,

## DEAL VALUE BY SEGMENT



EY estimates

the segment witnessed numerous attempts to digitalize its offerings, but could only recover a small fraction of revenues through that medium. The segment will continue to remain impacted for the first two quarters of 2021 before marketers and audiences feel comfortable about participating in live events.

### OOH

The segment lost out due to

reduced travel and less time spent out of the home on account of the lockdown. Largest hits were witnessed by premium transit properties, where passenger volumes plummeted. Digital OOH reached 5% of total segment revenues. The need for a credible and universally accepted measurement system for OOH continues to be critical for recovery.

### Radio

Radio revenues, which had fallen 7.5% in 2019, fell by over 50% again on account of both ad rate and volume drops as key advertiser segments (regional and retail) were unable to run their businesses at their usual scale. Revenues had recovered to over 50% of pre pandemic levels by the October to December quarter.

### Music

The digitization of music continued in 2020 with audio streaming revenues growing 15% but overall, music segment revenues were flat as performance rights fell by over 65%. ■

Source: EY FICCI M&E Report 2021



# TOP ENGLISH NEWS CHANNEL & THEIR FINANCIAL RESURGENCE

*NEWS is where the major action has been in the pandemic era. Despite the controversies galore, the news channels have held on steady in terms of the advertising revenues in the Covid era. We take a look at the leading news channel and how their numbers stacked up.*

## NDTV

New Delhi Television Ltd (commonly abbreviated as NDTV) is an Indian news media company focusing on broadcast and digital news publication. The company is considered to be a legacy brand that pioneered independent news broadcasting in India, and is credited for launching the first 24x7 news channel and the first lifestyle channel in the country. It owns and operates the broadcast news channels of NDTV India and NDTV 24x7. The two channels of the company have received 32 Ramnath Goenka Excellence in Journalism Awards.

NDTV was founded in 1984, by the journalist Radhika Roy and the economist Prannoy Roy, a husband and wife duo from the city of Kolkata in the state of West Bengal. It began as a production house for news segments for the public broadcaster Doordarshan and international satellite channels when television broadcasting was a

state monopoly and transitioned into the first independent news network in India. The company launched the first 24x7 news channel in partnership with Star India in 1998.

Between 1998 and 2003, NDTV was in an exclusive agreement with Star India to produce all its news segment.



In 2003, the company became an independent broadcasting network with the simultaneous launch of the Hindi and English language news channels known as NDTV India and NDTV 24x7. It also launched a business news channel NDTV Profit which was later converted into an information and entertainment channel NDTV Prime. The company has had business interests in general entertainment and e-commerce, and is part of the

management of a number of broadcast channels including the lifestyle channel NDTV Good Times, the infotainment channel Astro Awani and the news channel Independent Television through various joint ventures.

### NDTV Revenue

News broadcaster NDTV's consolidated revenue from operations for the quarter ended 31st December is ₹ 105.83 crore compared to ₹ 93.67 crore in the same period last year.

Total expenses stood at ₹ 82.4 crore compared to ₹ 85.03 crore a year ago.

The company said that it has delivered the best third quarter results in the last 11 years with a net profit of ₹ 22.69 crore compared to ₹ 12.13 crore.

The company posted an operating profit of ₹ 32.64 crore from the television media and related operations segment compared to ₹ 19.09 crore.

Revenue from the segment was ₹ 105.83 crore compared to ₹ 92.23 crore.

The company reported nil revenue from the e-commerce/retail segment.

On a standalone basis, NDTV's revenue from operations stood at ₹ 56.37 crore compared to ₹ 55.35 crore.

The company's expenses were ₹ 51.56 crore compared to ₹ 51.85 crore.

Net profit increased to ₹ 10.53 crore compared to ₹ 6.66 crore.

According to NDTV, this is the company's best quarterly result in the last eight years.

NDTV Convergence, the company's digital arm, has marked its best quarter ever with a profit of more than ₹ 10 crore; its revenue has increased by 32% over the same quarter last year.

Despite the business challenges thrown up by the pandemic, the company has so far in this financial year reduced its bank borrowings by ₹ 27 crore.

"NDTV thanks every member of its team for ensuring quality news was delivered to its vast audience despite the many impediments presented by the Coronavirus outbreak. Its reporters and crews have travelled all over the country to share the most credible and latest information on how India is handling the pandemic," the company said in a statement.

It further stated that the management is aware that the financial challenges of an economic slowdown continue to linger, with advertising yet to recover to pre-Covid levels; it is focused on mitigating any risk presented by this for the next few quarters.

## **CNN NEWS18**

CNN-News18 (originally CNN-IBN) is an Indian English-language news television channel founded by Rajdeep Sardesai located in Noida, Uttar Pradesh, India. It is currently

owned by Network 18 and WarnerMedia. CNN provides international coverage for the channel, while Indian Broadcasting Network concentrates on Indian and local reports.

In May 2014, Reliance Industries announced it would be taking over Network18. The move was touted as "the biggest-ever deal in the Indian media space". Reliance Industries already had indirect control of the TV18 network by virtue of investments it made in Network18 starting from January 2012.



### **CNN NEWS18 Revenue**

TV18 Broadcast, a subsidiary of Network18, has registered a 373.33% year-on-year growth in Q4FY20 consolidated profit due to strong revenue and operating EBITDA.

The profit for the quarter stood at ₹ 142 crore, up from ₹ 30 crore in the same period last year.

Controls on operating expenses and subscription revenue growth more than filled in for the decline in advertising helped the news business remain profitable, the company said.

Revenue from operations grew by 21% year-on-year to ₹ 1,425 crore in the quarter ended March 2020, the company said in its BSE filing. Linear TV subscription revenue growth was at 41% in Q4 and B2C annuity nature provided solidity, it added.

Its operating earnings before interest, tax, depreciation and amortisation (EBITDA) for the quarter shot up 365% to ₹ 240 crore against

₹ 52 crore in the corresponding period the previous year.

"Rise in the ranking of our flagship entertainment channel and upsurge in news consumption helped the group post growth in ad-revenues in the quarter, even as advertising was severely impacted during late-Q4 due to the COVID-19 related lockdown," the company said.

TV18 Broadcast said its profit for the financial year 2019-20 surged 98.57% to ₹ 417 crore and revenue grew by 5% to ₹ 5,175 crore compared to the previous year.

The full-year operating EBITDA stood at ₹ 703 crore, growing 124% over ₹ 314 crore reported in the previous fiscal.

TV18 said the benefits of a transparent and non-discriminatory B2C regime created by the implementation of the NTO (New Tariff Order) in Q4FY19 continued to accrue for the entire FY20.

Distribution improvements through tie-ups with cable and telecom platforms boosted the reach and enlarged the value-proposition of channel brands across a varied cross-section of viewers, it added.

TV18's Q4 average viewership share in news was 10.5%, up from 10.2% in Q3; while TV18 group's Q4 entertainment viewership share was 9.9% in Q4 versus 10.1% in the last quarter.

The contribution of subscription to the revenue mix has increased to 35% in FY20 from 26% in FY19, the company said.

## **INDIA TODAY TV**

India Today (formerly Headlines Today) is a 24-hour English language television network based in Noida, Uttar Pradesh that



carries news, current affairs and business programming in India. The channel is owned by TV Today Network Ltd, which is a part of Living Media.

The channel was launched in 2003 as a sister channel of the Hindi Aaj Tak news channel. It is one of the four news channels from the TV Today Network stable, the others being Aaj Tak, Tez and Delhi Aaj Tak. Alok Verma was brought in as the Executive Producer to successfully launch TV Today group's foray into the English news channel category.

#### **India Today Revenue**

TV Today Network Limited, which runs news channels Aaj Tak, India Today TV and Tez, and FM radio station Ishq FM, posted a net profit of ₹ 12.77 crore in Q1FY21, down 75% from ₹ 51 crore in the corresponding quarter of the previous year.

The company's total revenue for the quarter ending June 30, 2020, stood at ₹ 175 crore, down 32% from ₹ 260 crore in Q1FY20.

The television broadcasting business continued to contribute with more than 82% to the total revenue from operations of the company. The revenue from television operations stood at ₹ 137.79 crore, down 18% from ₹ 167.7 crore in the same quarter last year.

The radio broadcasting business earned a total revenue of ₹ 23 lakh in Q1FY21 compared with ₹ 3.78 crore in the first quarter of the previous year.

The company earned ₹ 2.13 crore during the quarter from the newspaper publishing business. The contribution of the newspaper business was 1.27% to the total revenue from operations. Following this, the company announced that it will stop publishing its compact daily Mail Today from August 10.

Income from others stood at ₹ 27.55 crore in the current quarter under review versus ₹ 27.97 crore in the same quarter of last year.

#### **REPUBLIC TV**

Republic TV is a free-to-air news channel launched in May 2017.

It was co-founded by Arnab Goswami and Rajeev Chandrasekhar, before the latter relinquished his stake in May 2019, leaving Goswami as the majority stakeholder. Chandrasekhar was an independent legislator from the National Democratic Alliance who later joined the Bharatiya Janata Party and Goswami was the former editor-in-chief of Times Now. The venture was funded primarily by Chandrasekhar through his company Asianet News.



Republic TV was funded in part by Asianet (ARG Outlier Asianet News Private Limited), which was primarily owned by Rajeev Chandrasekhar, a then-independent member of Rajya Sabha who had political links with Bharatiya Janata Party (BJP) and was vice-chairman of the National Democratic Alliance in Kerala. Among other major investors were Goswami himself, his wife Samyabrata Goswami, educationists Ramdas Pai and Ramakanta Panda — all of whom invested through SARG Media Holding Private Ltd.

Chandrasekhar resigned from the board, after he officially joined the BJP in April 2018; Goswami purchased back Asianet's shares in May 2019.

Republic TV allegedly became the most-watched English news

channel in India in its first week of airing in May 2017 with 21.1 lakh (2.11 million) impressions and accounted for 51.9 per cent viewership as per data released for the week by the BARC. The Financial Express noted Republic TV to be the most-watched English news channel in India for 100 weeks in a row since its founding. The top news channel spot was taken over by DD India, a public service broadcaster, in February 2019, according to the Indian newspaper Mint.

#### **Republic TV Revenue**

The free-to-air (FTA) channel has been launched with 19 strategic partners, with a commitment of spent of Rs 100 crore. "We are a cash positive company, with very less debt on our books. Also one of the reasons we have been able to launch the second channel within 19 months of rolling out the first one, is that our delivery to advertisers is highest. We ensure a good return-on-investment," Vikas Khanchandani, group CEO, Republic Media Network, said.

ARG Outliner Media Asianet News Pvt Ltd, the holding form of Republic Media Network, narrowed its net loss to ₹ 77 lakh, for the year ended March 2018, according to financial data accessed by business intelligence platform, Tofler. The news network posted a net loss of ₹ 6.9 crore in FY17. Total revenue rose to ₹ 157.5 crore in FY18 from just ₹ 1.6 crore in FY17.

#### **TIMES NOW**

The Times Now is a 24-hour English news channel in India owned and operated by The Times Group. The channel launched on 23 January 2006 in partnership with Reuters. It is a pay television throughout India. Until 2016, it was India's most popular and most

viewed English news channel. After 2016, the channel has typically ranked as the second most watched English news channel in India.

Times Now is a 24 hour English news television channel that provides the urbane viewers the complete picture of the news that is relevant, presented in a vivid and insightful manner, which enables them to widen their horizons & stay ahead.

TimesNow is brought to you by Times Global Broadcasting, a Bennett, Coleman & Co and Reuters service.



The Times Group is the largest media conglomerate in south Asia, with Leadership in newspaper publishing; magazines; music retailing; FM Radio; Internet; interactive media; mobile services and lifestyle television.

#### **Times Now Revenue**

Bennett Coleman and Company Ltd (BCCL) has recorded an increase of 7.87% in total revenue for the year ended March 31, 2019. The company has posted ₹ 6,985.91 crore as total income, compared to ₹ 6,476.08 crore for the year ended March 31, 2018.

The network's Profit After Taxation (PAT) has dipped 74.83% to ₹ 1,52.79 as compared to ₹ 607.08 crore in the previous year. Meanwhile, BCCL's advertising revenue has gone up by 1.7% to ₹ 4,845.15 crore as compared to ₹ 4,763.47 crore in FY 2018.

As per the financial statement from the Ministry of Corporate Affairs, in FY19 the network sales of publication and distribution revenue

decreased by 3.47% to ₹ 680.96 crore as compared to ₹ 705.49 crore in the previous year. The revenue from the sale of traded products and services has increased by 78.31% to ₹ 458.53 crore. The event income of the company has also increased by 28.2% to ₹ 261.80 crore as compared to ₹ 204.06 crore in the previous financial year.

The company has mentioned in its financial statement that the year 2018-19 continued to be a challenging one for print media owing to pressure from escalated newsprint price and marginal dip in advertising and circulation revenue vis-a-vis the previous year.

In the television news business, the network owns three channels - Times Now, ET Now and Mirror Now. Times Now continues its dominance in the English News category and maintains

its leadership position, as mentioned in the ROC filing. It further stated that ET Now has dedicated itself to the nation's development with the adoption of brand purpose- Rise with India. During the Union Budget coverage, ET Now was the undisputed leader with 82% viewership, the statement said.

In the entertainment business, the network owns Zoom, Movies Now, Romyd Now, MNX and MN+. The network claims that Movies Now retains the largest share of voice among the target audience, with a dominating leadership across social media.

TimesNowNews.com (Digital) started from the bottom of the comScore list in 2017 to enter the top three league in the English Digital News Publishing space in November 2018. Timesnownews.com has established itself as the fastest growing digital publisher, the statement reads.

## **INDIA AHEAD**

India Ahead is a nationwide English News Channel. It is promoted by Andhra Prabha Media Group and launched in June, 2018. The Channel carries news, current affairs, entertainment sports and business programming from Indian as well as International Perspective. It's the first English news channel to be beamed out of South India.



The tagline of India Ahead is "It's Good News" which highlights the vision to look ahead and aim to inform and influence in making a better India for the generation to come.

India Ahead was led by Chetan Sharma as Founding CEO and Editorial Director. He is a celebrated TV anchor, a veteran journalist having headed teams across leading media houses like NDTV, Zee Network and India Today, ESPN Star Sports and TWI. Renowned names in the field of journalism like Sudha Sadanand, Sourav Sanyal, Sana Khan and Jujhar Singh are leading the team of India Ahead. In June, 2020 Andhra Prabha Group's MD Mootha Goutam announced senior management changes to the English new channel India Ahead. While the founding CEO Chetan Sharma has moved on, the channel has made a series of senior appointments. Former CNN-News18 Sudeep Mukhia has joined India Ahead as Group President, News Room Operations & Editorial Strategies.

The channel became the No. 1 channel in terms of Average time spent by Viewers during the Budget Week

among all the English News Channels of India. Also, the channel is performing well in the Southern Indian States such as Andhra Pradesh, Telangana, Tamil Nadu and Karnataka.

India Ahead News Private Limited is a Private incorporated on 17 September 2013. It is classified as Non-govt company and is registered at Registrar of Companies, Hyderabad. Its authorized share capital is ₹ 100,000,000 and its paid up capital is ₹ 99,200,000. It is involved in Reproduction of recorded media [*This class includes reproduction of records, audio, video and computer tapes from master copies, reproduction of floppy, hard or compact disks, reproduction of non-customised software and film duplicating*]

India Ahead News Private Limited's Annual General Meeting (AGM) was last held on 29 September 2018 and as per records from Ministry of Corporate Affairs (MCA), its balance sheet was last filed on 31 March 2018.

Directors of India Ahead News Private Limited are Gopala Krishna Mootha, Mahesh Bigala, Goutam Mootha.

## WION (WORLD IS ONE NEWS)

WION (World is One News) is a multinational . English language news channel headquartered in New Delhi. It is owned by the Essel Group and is part of the Zee Media network of channels.

The founding team included Rohit Gandhi as editor-in-chief, Mandy Clark, former CBS correspondent, and Mithaq Kazimi, American media



executive, as managing producers respectively. Known journalists included Saad Hammadi, Bangladesh bureau chief and former correspondent for The Guardian, Archith Seshadri, former CNN anchor, and Tathagata Bhattacharya, former editor of the CNN web edition.

The current team includes Sudhir Chaudhary as editor-in-chief and Network18 former senior editor Palki Sharma Upadhyay as executive editor. Sidhant Sibal of DD News joined the organisation on 1 April 2018. Sumit Chaturvedi, who was earlier with ET Now and CNBC TV18, looks after the business news content and does morning and evening business shows WALLET. Republic TV's former news anchor Akanksha Swarup joined WION in 2018, becoming one of the channel's leading faces. Sayed Mustafa Kazemi became Afghanistan Correspondent for the channel in February 2020. Associated journalists include Naveen Kapoor, Digvijay Singh Deo, Rabin Sharma, Ieshan Wani, Kartikeya Sharma, and Alyson le Grange.

WION, India's first Global News channel, continues to carve out a niche for itself and attains Top English News channel position with highest viewer stickiness. (Source: BARC, NCCS 22+ Male AB, All India Urban, 0600-2400, Wk 40 - 52 '19 Average ATSV). During the quarter, the channel hosted profitable engaging events like the E-mobility Summit in

October, WION World Order- Talking Diplomacy and Mission Smart Cities 2020 in December with key stakeholders including ministers, industry leaders and distinguished guests.

## NewsX

NewsX is India's fastest growing English News Channel and enjoys highest viewership and highest time spent amongst educated urban Indians.



Ever since its acquisition by the ITV Network, the channel has witnessed unprecedented growth.

NewsX is the News Leader and sets the news agenda for the nation, with its crisp formats, straight forward reporting, pointed debates, trending hashtags, and engaging mix of stories.

It offers maximum news and continues to lead.

NewsX is owned by ITV Network Group. ITV Network is India's fastest growing news network, with two national news channels, four regional news channels, two newspapers and various digital assets. It employs more than 2025 people across 25 bureaus/offices and has more than 106 live video sources. The Network has a cumulative reach of more than 100 million viewers and readers on a regular basis. ■







## REPOSITIONING FOR 2021 – THE IABM TECHNOLOGY AND TRENDS ROADMAP HELPS DETERMINE YOUR FUTURE DIRECTION

*IABM's CTO, Stan Moote discusses how the changes everyone made in 2020 will help focus on having a fresh look at all businesses in the media content chain*

It goes without saying how embracing newer technologies kept our industry “on-air” during 2020. So what will be the new norm in 2021? The first step to establishing some sort of direction is to understand the direct affects of COVID over the past year on technology and trends. For example, pretty much everyone jumped into cloud and learned that it isn’t as scary for live and remote operations as many were concerned about. The use of off-the-shelf collaboration tools works – perhaps not ideal, but keep our media factories running. Business teleconferencing tools, built-in cameras within mobile devices and webcams permitted work from home



scenarios, not only for production crew, but also for on-air talent. All this being said, audiences started to accept glitches, streaming issues and for that matter more often than not poor video and audio quality; our expectations for more 4K UHD in 2020 turned into “COVID Quality”.

The IABM Technology and Trends Roadmap is being used by both business leaders and technology types to both help plot out their companies’ future directions and also assure that during each growth phase, no technology or trend is overlooked. I was fortunate to assemble a roadmap team of vendors and end-users covering all aspects of our industry. Although our team didn’t

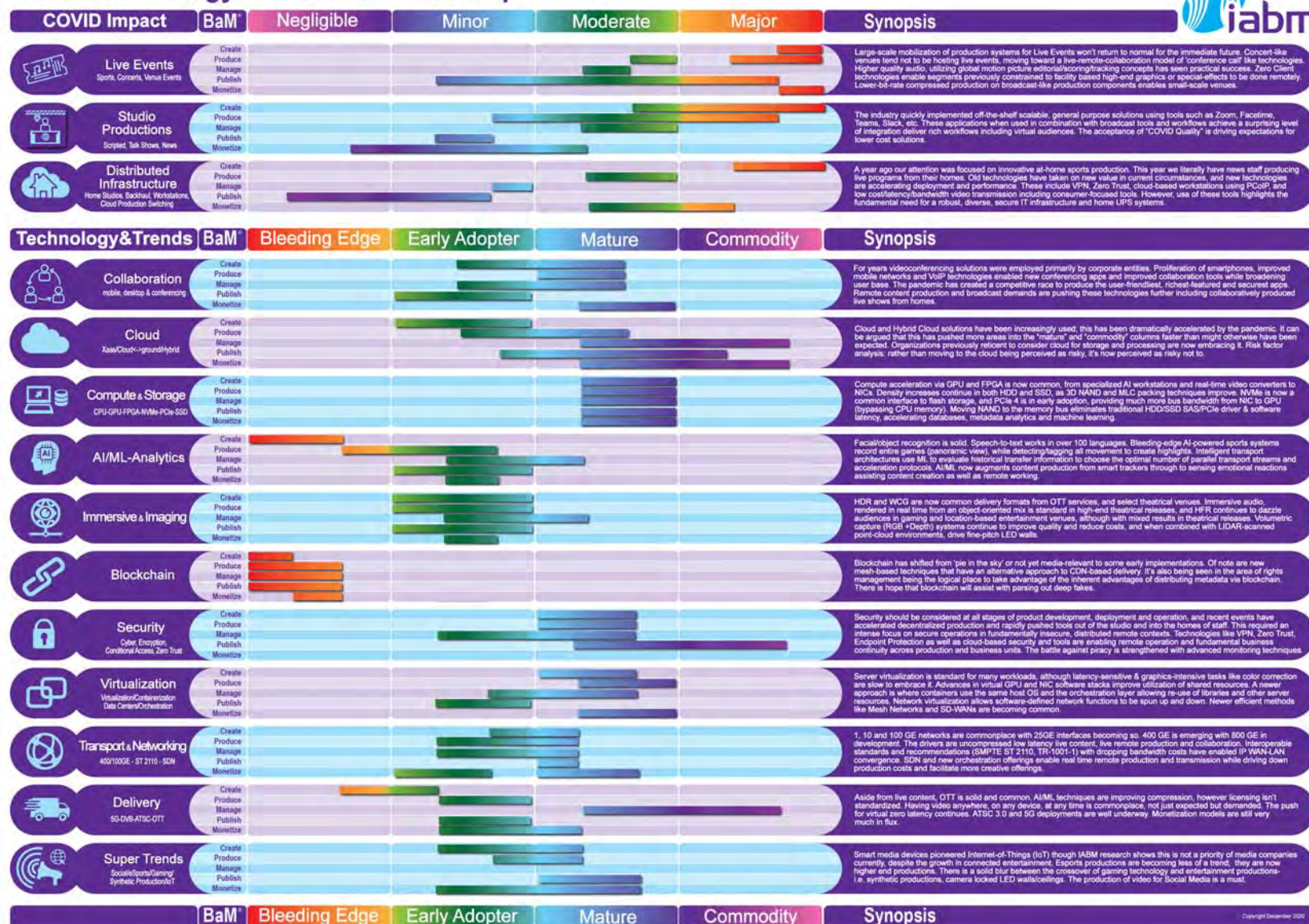
agree on every aspect, we did ultimately come to an agreement to produce this roadmap as an industry reference – a jumping-off point for your business.

For the 2020 IABM Technology and Trends Roadmap we felt it was best to understand the aspects of change in 2020, so we started out with a COVID Impact section plotting each area of the content chain over an impact range of negligible to major. As you can see in the graphic, some areas such as Publish had little impact, particularly on general playout and OTT except during a live event; remote delivery suddenly took on a whole new meaning.

**VIEW/DOWNLOAD THE FULL ROADMAP** Please note, you will need to be a registered user of our website to access this page.

Starting with Live Events, large-scale mobilization of production

# IABM Technology and Trends Roadmap



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systems for Sports and Venue Events won't return to normal for the immediate future. Concert-like venues with large audiences tend not to be hosting live events, moving toward a live-remote-collaboration model of 'conference call' like technologies to produce and engage spectators. Higher quality audio, utilizing global motion picture editorial/scoring/tracking concepts has seen practical success. The use of Zero Client technologies has enabled segments previously constrained to facility based high-end graphics or special-effects to be done totally remotely. Lower-bit-rate compressed production on broadcast-like production components has permitted small-scale venues.

News and Talk Shows quickly moved away from studio productions and took advantage of off-the-shelf scalable, general purpose solutions using tools such as Zoom, Facetime, Teams, Slack, etc. to keep on-air. Typically news had a huge head-start

as they already were using bonded cellular and Internet tools for remotes on a daily basis. With scripted series and talk shows, the off-the-shelf general applications used in combination with broadcast tools and workflows have achieved a surprising level of integration deliver rich workflows including virtual audiences. Currently with the acceptance of "COVID Quality" there is an expectation for lower cost solutions. With the bubble concept being used for scripted productions, one group told us they are so efficient having everyone locked away together, no waiting for people, no travel delays etc, on a go forward basis they want to continue using the bubble concept for shoots well into the future.

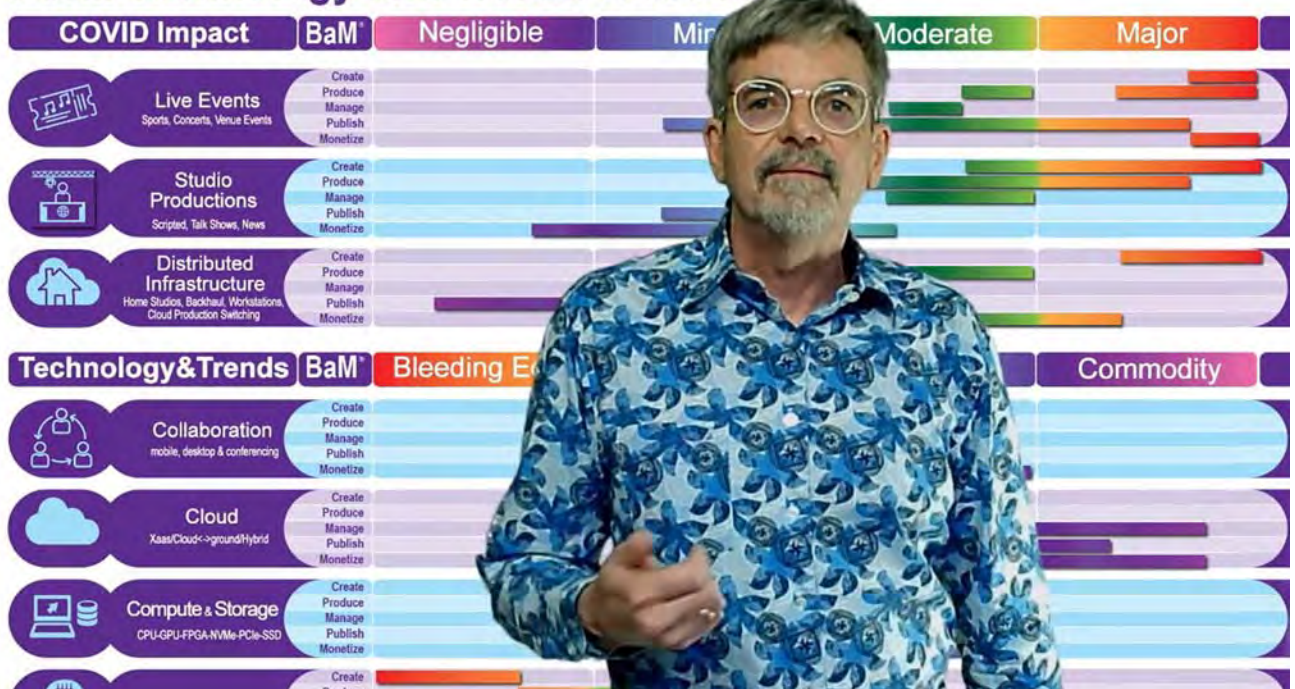
A year ago our attention was focused on innovative at-home sports production. This year we literally have news staff producing live programs from their homes with

Cloud Production Switching. Old technologies have taken on new value in current circumstances, and new technologies are accelerating deployment and performance. These include VPN, Zero Trust, cloud-based workstations using PCoIP, and low cost/latency/bandwidth video transmission including consumer-focused tools. However, use of these tools highlights the fundamental need for a robust, diverse, secure IT infrastructure and home UPS systems to handle Home Studios, Backhaul and remote Workstations.

Next the roadmap team took forty-plus technologies and trends and put them into similar groupings, plotting on the range from bleeding edge use-cases to commodity products and services.

No question, 2020 has been the year for collaboration, so we added this in as a trend as videoconferencing solutions have become indispensable. Proliferation

## IABM Technology and Trends Roadman





of smartphones, improved mobile networks and VoIP technologies enabled new conferencing apps and improved collaboration tools while broadening user base. The pandemic has created a competitive race to produce the user-friendliest, richest-featured and securest apps. Remote content production and broadcast demands are pushing these technologies further including collaboratively produced live shows from homes.

Cloud and Hybrid Cloud solutions have been increasingly used; this has been dramatically accelerated by the pandemic. It can be argued that this has pushed more areas into the “mature” and “commodity” columns faster than might otherwise have been expected. Organizations previously reticent to consider cloud for

storage and processing are now embracing it. Here is a key thought for 2021 as a risk factor analysis: rather than moving to the cloud being perceived as risky before 2020, it's now perceived as risky not to.

Compute acceleration via GPU and FPGA is now common, from specialized AI workstations and real-time video converters to NICs. Storage density continually increases for magnetic hard drives as well as solid state drives, as 3D NAND and MLC packing techniques improve. NVMe is now a common interface to flash storage, and PCIe 4 is in early adoption, providing much more bus bandwidth from NIC to GPU

(bypassing CPU memory). By using the new techniques of moving NAND to the memory bus gone is the traditional HDD/SSD SAS/PCIe driver & software latency, hence accelerating databases, metadata analytics and machine learning computations.

Using Artificial Intelligence for facial/object recognition is solid. Speech-to-text now works in over 100

venues. Immersive audio, rendered in real time from an object-oriented mix is standard in high-end theatrical releases, and HFR continues to dazzle audiences in gaming and location-based entertainment venues, although with mixed results in theatrical releases. Volumetric capture (RGB +Depth) systems continue to improve quality and reduce costs, and when combined with LIDAR-



“We see creative collaboration as central to success for our industry and we have launched a number of initiatives aimed at fostering this over the last 18 months. The Technology and Trends Roadmap is another large step forward in nurturing the partnerships that will drive all our futures. As with the BaM Content Chain®, it is also a ‘living’ concept that can provide a secure basis for business decisions not just now, but way into the coming years too.”

**PETER WHITE, CEO, IABM**

languages and has remarkable natural feel. Bleeding-edge AI-powered sports systems record entire games (panoramic view), while detecting/tagging all movement to create highlights. Intelligent transport architectures use ML to evaluate historical transfer information to choose the optimal number of parallel transport streams and acceleration protocols. AI/ML now augments content production from smart trackers through to sensing emotional reactions assisting content creation as well as remote working.

HDR and WCG are now common delivery formats from OTT services, and select theatrical

scanned point-cloud environments, drive fine-pitch LED walls.

Blockchain has shifted from ‘pie in the sky’ or not yet media-relevant to some early implementations. Of note are new mesh-based techniques that have an alternative approach to CDN-based delivery. It's also being seen in the area of rights management being the logical place to take advantage of the inherent advantages of distributing metadata via blockchain. There is hope that blockchain will assist with parsing out deep fakes.

I can't emphasize how important that security must be considered at all stages of product development, deployment and

operation. Since recent events have accelerated decentralized production and rapidly pushed tools out of the studio and into the homes of staff, security concerns are even more imperative to be in strict practice. Technologies like VPN, Zero Trust, Endpoint Protection as well as cloud-based security and tools are enabling remote operation and fundamental business continuity across production and business units. The battle against piracy is strengthened

host OS and the orchestration layer allowing re-use of libraries and other server resources. Network virtualization allows software-defined network functions to be spun up and down. Newer efficient methods like Mesh Networks and SD-WANs are becoming more common.

1, 10 and 100 GE networks are commonplace with 25GE interfaces becoming so. 400GE is emerging with 800GE in development. The drivers are uncompressed low latency live

Aside from some live content, OTT is solid and common. AI/ML techniques are improving compression, however licensing isn't standardized. Having video anywhere, on any device, at any time is commonplace, not just expected but demanded. The push for virtual zero latency continues. ATSC 3.0 and 5G deployments are well underway. Monetization models are still very much in flux.

To capture other areas such as Social Media, Esports, Gaming, Synthetic Production and Internet-of-Things (IoT), we group them as Super Trends. Our industry pioneered IoT with smart media devices, although sorrowfully IABM research shows this is not a priority of media companies currently, despite the growth in connected entertainment. Esports productions are becoming less of a trend; they are now

higher end productions, the difference being using more networking tools, over traditional broadcast. There is a solid blur between the crossover of gaming technology and entertainment productions- i.e. synthetic productions, camera locked LED walls/ceilings. The production of video for Social Media is a must and COVID has made this abundantly clear. ■



"One of the constantly moving challenges in our industry is not only keeping up with all the new technology trends, but also having a deep enough dive to understand what is truly relevant and not simply just a 'fad'. Our industry pumped 25% of hard-earned revenue back into R&D in the last half of 2018 - so every penny spent needs to be as close to a sure bet as possible. End-users also have a similar issue understanding which technology to bet on, what they can't live without – the 'must haves' - and which will capture more market share for them, as well as providing a path of profitable growth. The Technology and Trends Roadmap will help address these fundamental business questions for everyone involved with broadcast and media technology"

**STAN MOOTE, CTO, IABM**

with advanced monitoring and watermarking techniques.

Server virtualization is standard for many workloads, although latency-sensitive & graphics-intensive tasks like color correction have been slow to embrace it. Advances in virtual GPU and NIC software stacks improve utilization of shared resources. A newer approach is where containers use the same

content, live remote production and collaboration. Interoperable standards and recommendations (SMPTE ST 2110, TR-1001-1) with dropping bandwidth costs have enabled IP WAN-LAN convergence. SDN and new orchestration offerings enable real time remote production and transmission while driving down production costs and facilitating more creative offerings.

*Source : IABM*



## ASHOK MANSUKHANI: DISTINGUISHED MEDIA VETERAN RECOUNTS ON OTT, CATV & BROADCAST MARKET

*Ashok Mansukhani (AM), the name personifies an exemplary media personality with an impeccable track record and credentials across the media and entertainment space.*

*His illustrious career saw him executing various roles in different capacities and rendering yeoman service to the media industry.*

*In an exclusive interview with Broadcast & Film Magazine, Ashok talks about his journey and his professional career.*

**Q.1:** *You had a distinguished track record as an IRS officer in the Central Govt and later joined the Hinduja Group in 1996. Tell us about your journey in the broadcast media industry.*

**AM:** **AIR/DOORDARSHAN**

My media journey started very early. Neil Armstrong walked on the Moon in July 1969. In the same month, All India Radio set up a youth channel called Yuva Vani. It advertised for young reporters to join the Central Newsroom of All India

Radio and file youth-oriented stories for the Yuva Vani News Channel and contribute to the general pool. In the same month, I was appointed as a part-time correspondent and worked there for two years. During that period, I also took part in many Yuva Vani radio programmes covering diverse topics. This was the time that Television was becoming popular. I got a chance to be among India's first set of television anchors presenting black-and-white TV programs telecast on Delhi Doordarshan.

**JUNIOR STATESMAN**

This was also when the 'Statesman' Kolkata had launched a youth magazine that became iconic in the early 70s named 'Junior Statesman'. It was run by a large hearted editor named Desmond Doig who encouraged young writers to contribute articles and poems to the magazine. I joined the magazine as a fortnightly columnist contributing articles on life and time in Delhi from a youthful perspective.



### TIMES OF INDIA GROUP

In 1971, I joined the 'Times of India' Group as a journalist trainee in Mumbai and within three months found myself in Ahmedabad as a sub- night editor of the 'Times of India' newspaper. In February 1972 President Richard Nixon visited China, and I was entrusted with editing a two-page special supplement on his historic visit. This was a great learning experience for me. In the summer of 1972, I was transferred to Delhi as the 'Times of India' Group had also decided to launch its youth magazine- 'Youth Times'. For three years, I was to stay in this magazine my main task being to produce and publish the magazine every fortnight.

### INDIAN REVENUE SERVICE

In 1974, I took the Indian Administrative Service and Allied Services entrance exam that I passed in 1975 and ended by first media foray.

I was allotted the Indian Revenue Service (Income Tax) and started my career as an Income Tax Officer.

### DOORDARSHAN

Many years later, in 1992, I was stationed at Mumbai when out of the blue, I was given written directions to proceed to New Delhi as Deputy Director General (Administration and Vigilance).

This started my four-year span

dealing with the human resource requirements and administration requirements of 20,000 employees belonging to various streams, including programming, engineering, finance and administration. This was an entirely new media experience for me.

It was also a time for a significant transformation of Doordarshan from a single channel network to gradually becoming Asia's largest regional broadcaster. Under the dynamic direction of Mr Bhaskar Ghosh, Secretary Ministry of Information and Broadcasting and Mr Rathikant Basu, Director General Doordarshan, in the period 1992 to 1995, more than 20 regional language satellite channels launched from the state capitals in diverse languages ranging from Malayalam to Bangla to Marathi and Kashmiri. These channels brought in a unique feature of being produced from the state capitals but being available nationally through satellite to all viewers wherever they



lived. Twenty-five years later, these regional satellite channels continue to operate and have provided a good platform for regional advertising.

Indian Revenue Service and joined the Hinduja Media Group based in Mumbai as Chief Operating Officer IndusInd Media and Communications Limited (IMCL). In the past 24 years, I handled diverse operating and corporate and Board-level assignments and have recently retired as Managing Director of NXT DIGITAL Limited. This is the Hinduja Media Group's flagship providing digital cable services in major metros through the In Digital service. The company also operates India's only Headend-In-The Sky service NXT Digital which offers state of the art digital cable service in all 29 states in different and varied terrain from Kutch to Agartala and Kashmir to Kanyakumari.

**Q.2:** *Hinduja has been a pioneer in the broadcast, cable, satellite, and broadband industry for over two decades. Tell us about the major initiatives by Hinduja when you were the MD of the Hinduja Media Group?*

**AM:** In the first 3-4 years starting in 1996, I helped IndusInd Media and Communications Limited (IMCL) consolidate its cable operations by launching significant metros operations, making it India's pioneer Multi-System Operator. This was done by setting up direct operations and creating a chain of hundreds of



lived. Twenty-five years later, these regional satellite channels continue to operate and have provided a good platform for regional advertising.

### HINDUJA MEDIA GROUP

In 1996, I took voluntary retirement from the

operators in seven cities and over fifteen joint ventures in a unique partnership with the local cable operators in a corporatized set up. This model has been followed by other MSOs who came up later.

In 2000, I was made CEO of IndusInd Entertainment Limited a video content and TV network company of the Hinduja Group. I ran the very popular 'In Mumbai' cable channel and pioneered a new city news channel concept in five languages called 'In Time'.

In 2001, I was transferred to the Hinduja Group holding company- Hinduja TMT Limited (later renamed as Hinduja Ventures and now named NXT DIGITAL Limited) as Executive Vice President Corporate Services serving as Promoter representative on all the subsidiary company boards rendering corporate advice, devising business strategies for emerging business scenarios and legal/tax and litigation support.

In 2012, I was appointed to the Board of Hinduja Ventures Limited (now NXT DIGITAL Limited) and made the holding company's Whole Time Director.

I simultaneously became Managing Director in 2017 of IMCL and was promoted to Non- Executive Vice Chairman of the Company in 2018 and have recently completed my tenure in the IMCL Board in November 2020 after 21 years.

In 18 months as MD IMCL, I operationalized the Headend in the Sky (HITS) satellite cable platform creating a new team of young entrepreneurs who run their networks and take backend support from the company on a unique revenue-sharing model.

In 2018 I was elevated to Managing Director of Hinduja Ventures



*"I was President of the Multi-System Operator Alliance for a decade and worked actively with the Cable and Broadcast Regulator TRAI and the Ministry of Information and Broadcasting striving to create a level playing field to enable the linear distribution industry to survive."*



Limited (now NXT DIGITAL Limited) and completed my term in September 2020. A key achievement was to shepherd the transfer (by NCLT merger) of the Group's cable and HITS business from IMCL to NXT DIGITAL in August 2020 with all regulatory and corporate approvals in a record time of six months in the lockdown period. During this period, I also served on all the Hinduja Media group boards and contributed both corporate and strategic expertise to the content company In-Network Limited; the broadband company One

OTT Limited and provided corporate advisory services, especially corporate governance, and taxation to the entire Hinduja Group.

I was President of the Multi-System Operator Alliance for a decade and worked actively with the Cable and Broadcast Regulator TRAI and the Ministry of Information and Broadcasting striving to create a level playing field to enable the linear distribution industry to survive.

I have been involved in all the significant litigation right from the time TRAI became the Regulator, and Broadcasters challenged its appointment in 2005 to the present day when the Broadcasters challenged the second of New Tariff Order.

I vividly remember two cases being the Delhi High Court judgement of 2007 upholding the appointment of Trai as the broadcast and cable regulator. The second that brought a significant change in the entire cable industry's fortunes was the New Tariff Order upheld by the Supreme Court in 2018. This corrected a substantial distortion in the business model of an industry that had suffered at the hands of Broadcasters who had always had

the upper hand in forcible revenue collection with no fair revenue-sharing.

**Q.3:** *The Covid 19 lockdown has impacted the business worldwide. How do you see the impact of this on the business and how soon will the companies get over this and bounce back?*

**AM:** The Covid 19 lockdown left the cable industry as underprepared as most industries with one exception. As people were forcibly confined to homes for a couple of months, they turned to the Television for information, entertainment and refuge. Broadcasters who are dependent on serials, live sports, reality shows, suddenly had only repeats to show. News channels certainly gained in viewership but because of the current stage of polarisation based on ideological considerations news channels do not carry much credibility except for diehard viewers.

This led to viewers looking at other means of entertainment. OTT Networks like Netflix and Amazon Prime seized the opportunity and utilized their vast library to provide a never-ending stream of fresh content. In the past year, Netflix has posted substantial growth of 26% in just one year. It is a recent marketing move to offer free access over a weekend gained it lakhs of viewers. Another smart move was introducing in India pricing for their premium content, which helped it increase. A recent statement by Netflix stated that India has the highest viewership of films globally on its platform, and consumption of content in genres like kids, non-fiction and Korean dramas have shown strong growth. Regional movies finding closure of cinema halls to continue decided to go in for direct OTT releases to recover the cost. Amazon Prime too has seen explosive growth in Indian



viewership with about 25 million Indian viewers. Disney Hotstar is not too far behind with approximately about 10 million viewers. Zee 5 has combined with Alt Balaji to scale up rapidly. Hotstar like Sony Liv has live-action cricket, football, and other popular sports like tennis to give them the impetus to add more viewers. With over 50 OTT platforms, there is an urgent need for an OTT aggregator.

**Q.4:** *How has the transition of the Indian broadcast, cable and satellite industry been over the years? And how do you see the future of Indian broadcast, cable and satellite in the next five years?*

**AM:** Some doomsday pundits talk of cord cutting. My educated guess is that

cable and OTT platforms will coexist shortly. The traditional single screen linear distribution model for the cable industry is dead. The cable must shake off its complacency and rapidly and aggressively install fibre-to-home if it were not to become redundant like the pager industry a decade ago. Those Multisystem Operators who operate broadband networks can scale up and retain their customer base by providing high-quality digital cable; a variety of OTT content and consistent broadband to create customer stickiness.

Another failure of the cable industry, which caused its economic distress in the lockdown was the resort to outmoded cash collection methods without providing customer





satisfaction of proper billing and receipts. The hard lockdown led to reduced monthly collections, thereby upsetting the entire financial model of cash being collected by the local operator, being passed on to the MSO after being passed on to the broadcaster. My company NXT DIGITAL has been operating in a prepaid model for over five years now and had no difficulty collecting subscription deals due to the availability of many digital payment types. The rest of the industry must follow suit to help them survive the future.

*“OTT Networks like Netflix and Amazon Prime seized the opportunity and utilized their vast library to provide a never-ending stream of fresh content. In the past year, Netflix has posted substantial growth of 26% in just one year.”*

India has reached a saturation point for deployment of traditional cable in the metros and the urban areas. I estimate that through the census figures are a decade old India has approximately 25-30 million homes yet to receive digital cable or broadband benefits. These exist in semiurban areas, rural areas, and deep rural areas which we can describe as dark cable areas.

I am intrigued that there are approximately 1500 multisystem operator as per July 2019 latest figures. Another interesting statistic is that 15 of India's top MSOs have 78% of India's cable TV market. Of these 1500 MSO, at least 500 are not operating at full capacity.

There could be many reasons for this, of the but indeed 30 million

homes should be sufficient incentive for the cable industry to penetrate the rural areas low-cost but high-quality digital cable combined with reasonable bandwidth speed speeds to entice the rural customer to subscribe to the regional MSOs.

Government's recent approval of infrastructure sharing should be highly publicized to regional MSOs to set up cable cooperatives to operate from a single digital mega headend in a district town from which smaller MSOs can share the infrastructure to supply cable broadband to their rural base. Of course, there is a more straightforward solution for these operators to link up with the NXT DIGITAL HITS platform and take state of the art digital backend services like 1500 of their colleagues have done in the past four years.

If MSOs connect more and listen to their vast customer base to convert themselves into digital service providers, I expect them to survive the next five years and remain the primary option for Indian viewers to consume electronic media.

**Q.5: Which are the segments that Hinduja Group is targeting apart from the broadcast & cable industry?**

**AM:** The Hinduja Group is one of the largest diversified groups globally in 38 countries and activities spanning 100 countries. It operates globally ten business verticals that range from banking and finance to information technology-enabled services group enjoys collection presents to leading

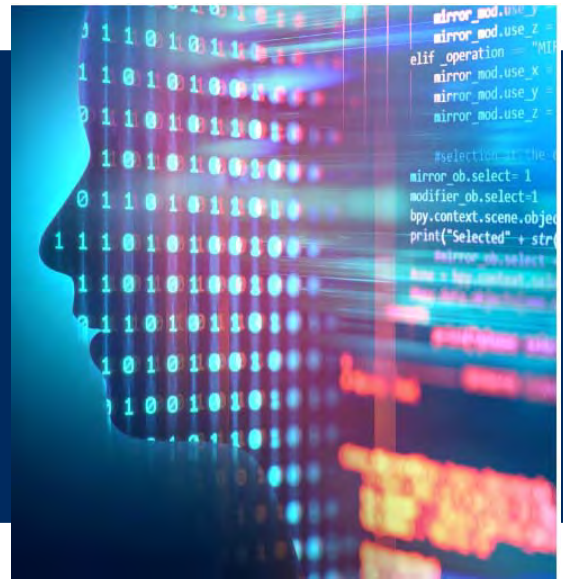


companies, some of which local and national icons. Within the Hinduja media, I see a bright future of ONE OTT Limited the broadband subsidiary of next digital limited. It has gained enormously in the lockdown by adding many new customers and can more than triple its subscriber base in the next 2 to 3 years. With infrastructure status granted to the HITS platform, the possibility of adding many more multisystem operators on the back end model is very strong.

**Q.6: TRAI's recommendation on STB Interoperability will allow consumers to change their DTH operator without buying a new set-top box. This has thrown the industry into a tizzy. How do you view this development?**

**AM:** STB interoperability was talked about even in the first stage of CAS installation in 2004. However, due to vested interests and political indecisiveness, India's digitalization took over a decade to take off by which hundred million customers already been given Vanilla set-top boxes that are not interoperable. DTH regulations have always provided for interoperability, but DTH boxes are also not interoperable. To me, personally, the recommendation is dead and incapable of being implemented in the near future. ■

# IABM'S REPORT "CHARTING THE UNCHARTED"



*IABM's Comprehensive analysis plots the future course for  
Broadcast and Media industry*

IABM released its latest biannual Special Report. Titled 'Charting the Uncharted' – reflecting the enormous upheaval the industry is experiencing – the report is the result of in-depth analysis by IABM's Business Intelligence Unit of a wealth of qualitative and quantitative research on the present state and potential future paths for our industry. It is clear that the coronavirus pandemic has compressed fundamental changes that were already slowly underway in the industry into just months or even weeks. The effects of this are far-reaching across every corner of the Broadcast and Media industry.

Inputs used to produce the report include in-depth interviews with media companies and

technology suppliers, IABM's continually updated Coronavirus Impact Tracker, and IABM's Media Tech Business Tracker. The report identifies the multi-dimensional change that is impacting Broadcast and Media fuelled by the move to

generation of IT and environment-aware talent.

The coronavirus pandemic and ensuing lockdowns have driven digital subscriptions massively upwards, while traditional Pay-TV and advertising-based business models have been hit hard – especially so in relation to cancelled live sports programming. Stay-at-home mandates have also caused a fundamental shift in working patterns – and massively accelerated the industry's previously pedestrian progress towards dematerialized operations in the cloud, underpinned by as-a-service technologies and business models.

To survive the storm, traditional broadcasters have moved rapidly to supplement their output



direct-to-consumer (DTC) business models across the industry. The propellants include the changing role of technology, the move to as-a-service, insourcing and a new

## REPORT

with DTC offerings, and to search for the necessary scale to compete with the digital giants through acquisition or consolidation as well as increased investment in content. The move to DTC with its thinner margins also requires increased efficiency and agility, producing a greater focus on business models. Technology has become merely an enabler for those business models, and broadcasters are increasingly turning to insourcing for better control and responsiveness. The new skills required are often being recruited from outside the industry, with traditional broadcast engineering skills becoming less and less in demand.

The Charting the Uncharted report also examines the effects of these changes across each segment

of the BaM Content Chain® as well as in discrete operational sectors, providing additional insights for



**PETER WHITE**  
CEO, IABM

companies with products/services in each of these areas. The report can be seen at <https://theiabm.org/iabm-special-report-september-2020/>

“At a time when we are all working so hard just to keep up with the transformational changes going on all around us, Charting the Uncharted gives us a unique opportunity to stand back and take a look at the bigger picture,” said Peter White, CEO, IABM. “We can measure what are we doing, how we do it, and why are doing it against the whole industry background. I am proud of the fantastic work our Business Intelligence Unit has done in researching and producing the report. Charting the Uncharted is brim full of fact-based insights and I would say it is essential reading for everyone in the industry.” ■

*Source : IABM*



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# HPA'S THE FOUND LEDERHOSEN USES BLACKMAGIC DESIGN DAVINCI RESOLVE STUDIO AND URSA MINI PRO 12K



*Blackmagic Design announced the multi-film project, "The Found Lederhosen," created for the 2021 HPA Tech Retreat Supersession*

Blackmagic Design announced the multi-film project, "The Found Lederhosen," created for the 2021 HPA Tech Retreat Supersession, used DaVinci Resolve Studio and URSA Mini Pro 12K for several of its five segments. This included the use of DaVinci Resolve Studio running on Amazon Elastic Compute Cloud (Amazon EC2) and Amazon Simple Storage Service (Amazon S3) for editing of the short film "La Inquilina."

"The Found Lederhosen" plays a key role on day one of the Supersession, a two-day interactive exploration of the workflows and technology of multiple productions taking place around the globe. The "Found Lederhosen" filmmakers, led by Joachim "JZ" Zell, will highlight real world examples of the tools, tech, workflows and more than

200 artists who worked remotely to complete the short films during the worldwide COVID 19 quarantines.

Filmmakers from London, Dubai, Mongolia, Mexico City, Brisbane and Hollywood all



volunteered to create the films specifically for the event and in illustration of remote collaboration and the rapid forward movement of technology. During the Supersession, JZ will highlight how these filmmakers

worked to keep themselves safe while redefining creative, connected, remote, collaborative and cloud-based workflows.

"The Found Lederhosen" brought together seven movies, six cities, five audio mixes, four color spaces, three uses of cloud storage services and two transmitters. It was a huge effort, and it shows exactly what can be accomplished in new remote workflows," JZ said. "The virtual post workflows of these films were even more global in scope than the productions, bringing together post artists from all over the globe who collaborated like they were in the room next door. A huge part of what made this possible was DaVinci Resolve."

"La Inquilina" DP and Producer Sandra De Silva De La Torre and her team used DaVinci Resolve Studio for

numerous parts of the post production workflow, including dailies, editing, audio editing, color correction and delivery. They used DaVinci Resolve Studio, running on Amazon's EC2 G4 instances in conjunction with Amazon FSx for shared file storage, to edit the film, allowing for seamless collaboration between Editor and Colorist Diego Yhamá, who was based in Colombia, and Sandra, who was based in Mexico City.

"Connecting virtually using DaVinci Resolve Studio's collaboration tools running on AWS was an extremely powerful workflow for post production on 'La Inquilina,'" said De Silva De La

"The Found Lederhosen." Produced by award winning filmmaker and actress Bayartsetseg Altangerel (Bayra Bela) and edited by Lithuanian based Aleksandras Brokas, the film follows three foreign art students during level 4 lock down in London. DaVinci Resolve Studio was used for editing, color correction and audio mixing by using DaVinci Resolve's collaboration features to connect the director and producer in London with Brokas in Lithuania.

"Resolve's collaboration features let us easily work edits back and forth, and the headache I was expecting with this post production

Fantasy thriller using the URSA Mini Pro 12K. "The camera resolution gave us much needed confidence on set in making creative choices, especially when the shot would involve visual effects," said Abdullah. "I also knew with Blackmagic's color science I could achieve the look I wanted, even when forced to shoot in low light or difficult conditions, as we faced shooting in the Dubai desert."

"The mission of The Found Lederhosen is to show that any project can be done anywhere and to show the leading-edge workflows that make this possible," JZ said. "With the global need, it was natural that so many of the filmmakers used Resolve because it is the most widely used post tool out there."

The ability to use DaVinci Resolve Studio as a common platform to create and use the best people anywhere was a key part of making "The Found Lederhosen." DaVinci Resolve Studio's ability to work in a wide array of formats and specs was also important, since the filmmakers were shooting with different camera systems but all had to finish in ACES and Dolby Vision.

"With the films, we had to have the ability for the filmmakers and post artists to exchange information and create together anywhere at any time. Resolve is everywhere, used by the biggest group of artists," JZ continued. "So it was a great platform for us to rely on."

"The workflow used by 'La Inquilina' using Resolve running on AWS in particular was a great example of what a powerful new remote workflow could do. The filmmakers and post artists, which were spread between LA, Mexico and Colombia, had the flexibility, adaptability and scalability to create in high quality. The freedom of interaction that combining AWS and Resolve brought was amazing," JZ said. ■



Torre. "Due to the current circumstances with the pandemic, the opportunity to be part of the HPA's project and collaborate remotely with filmmakers around the globe was very appealing to me. It is amazing to know that there were many crews in different parts of the world creating a story for the same purpose: to test and understand new workflows that not only further support our actual situation, but that also provide access to a new level of connectivity for filmmakers around the world."

DaVinci Resolve Studio was also used on "KINTSUGI," the London and Mongolian based film done for

process never happened. We had initially started editing with another NLE, but Aleks convinced us to do everything in Resolve, which made getting the film done efficiently and meeting our creative visions," said Bayartsetseg. "We used Resolve in London to edit dailies and sent the files directly to Aleks, and were able to skip conforming. Grading and prep for Dolby Vision was done in London and sound mixing was done in Taiwan using Resolve. A true global team."

For the Dubai film "Neo-Bedouin," cinematographer Marc Paskui and Director Abeer Abdullah shot the pandemic inspired Sci Fi/



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**Varun Gaba**

Director - Projects

Tel.: +91-22-6216 5303

Mob.: +91-99458 26427

Email: [varun.gaba@nm-india.com](mailto:varun.gaba@nm-india.com)

**Geeta Lalwani**

Project Manager

Mob.: +91-70218 50198

Email: [scat.sales@nm-india.com](mailto:scat.sales@nm-india.com)

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**Manoj Kumar Madhavan**

Editor (Satellite & Cable TV Magazine)

Tel.: +91-22-6216 5313

Mob.: +91-91082 32956

Email: [manoj.madhavan@nm-india.com](mailto:manoj.madhavan@nm-india.com)





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**Varun Gaba**  
Director – Projects  
T: +91 22 6216 5303  
M: +91 99458 26427  
E: [varun.gaba@nm-india.com](mailto:varun.gaba@nm-india.com)

**Pranali Raut**  
Asst. Director – Projects  
T: +91 22 6216 5313  
M: +91 99458 26440  
E: [pranali.raut@nm-india.com](mailto:pranali.raut@nm-india.com)

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