



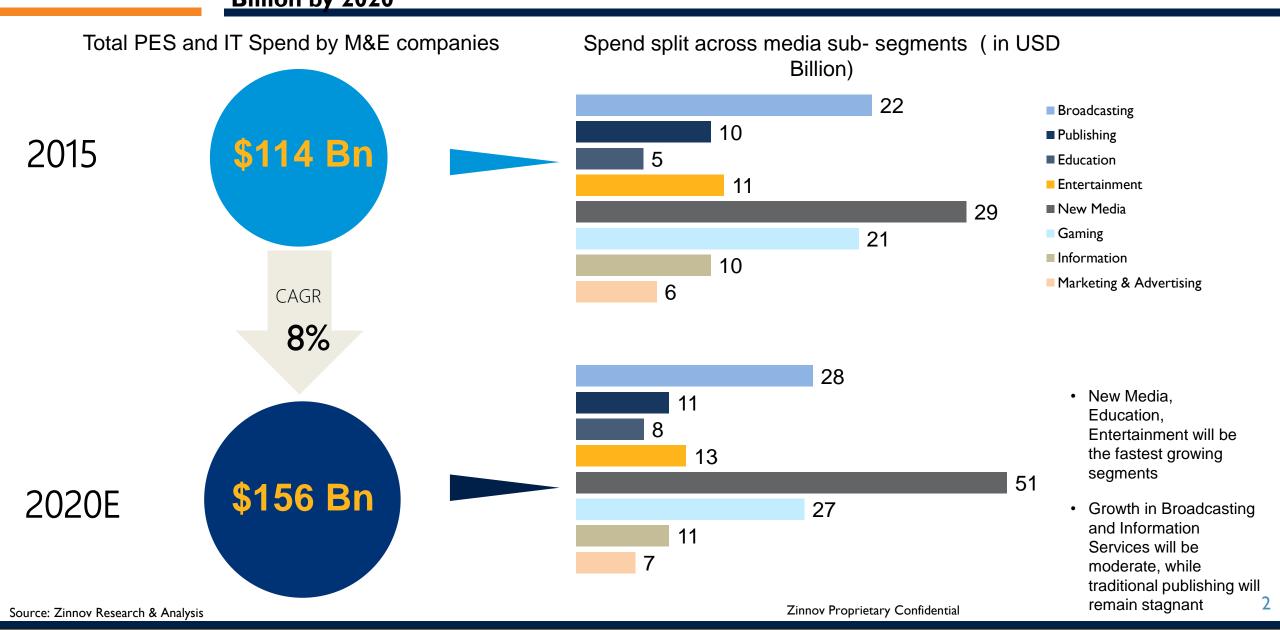
# GLOBAL SERVICE PROVIDER RATINGS, 2015 FOR Media and Entertainment Vertical

An Analyst Point of View for **L&T Infotech** August, 2016



The total spend on IT and PES by Media and Entertainment companies stand at USD 114 Billion (2015), expected to grow at a CAGR of 8% to reach USD 156 Billion by 2020

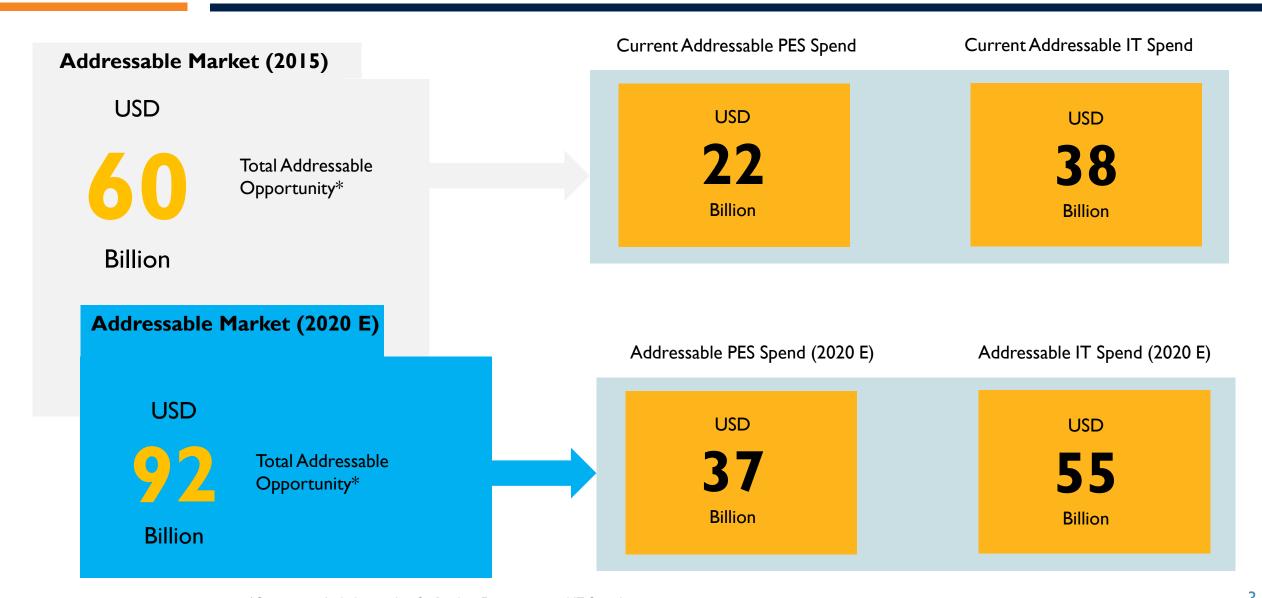






# The addressable PES and IT globalization and services opportunity stands at USD 60 billion and will reach USD 92 billion by 2020

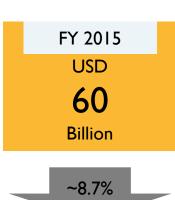




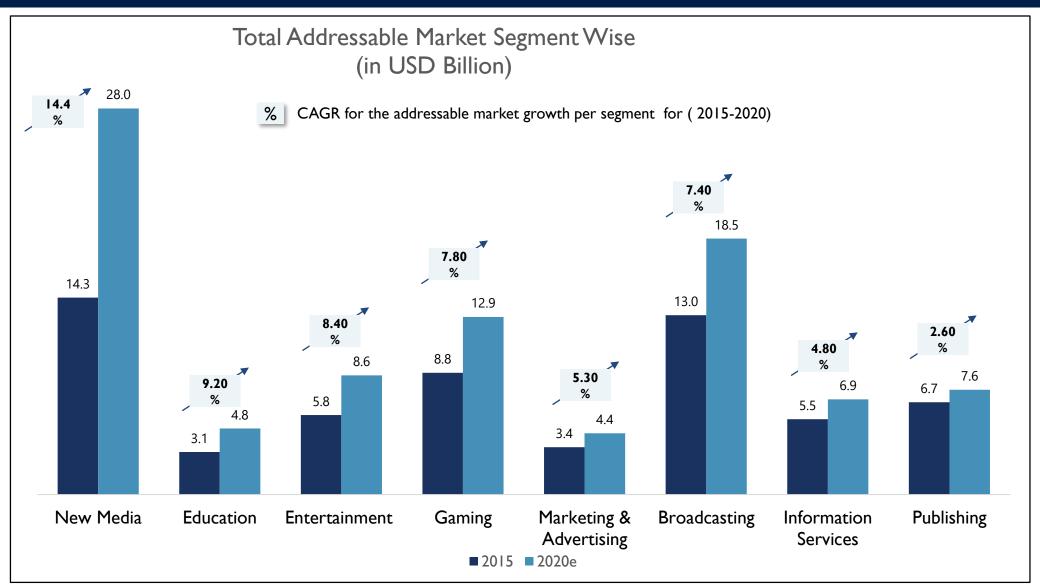


## The addressable market is expected to grow at a CAGR of ~8.7% till 2020





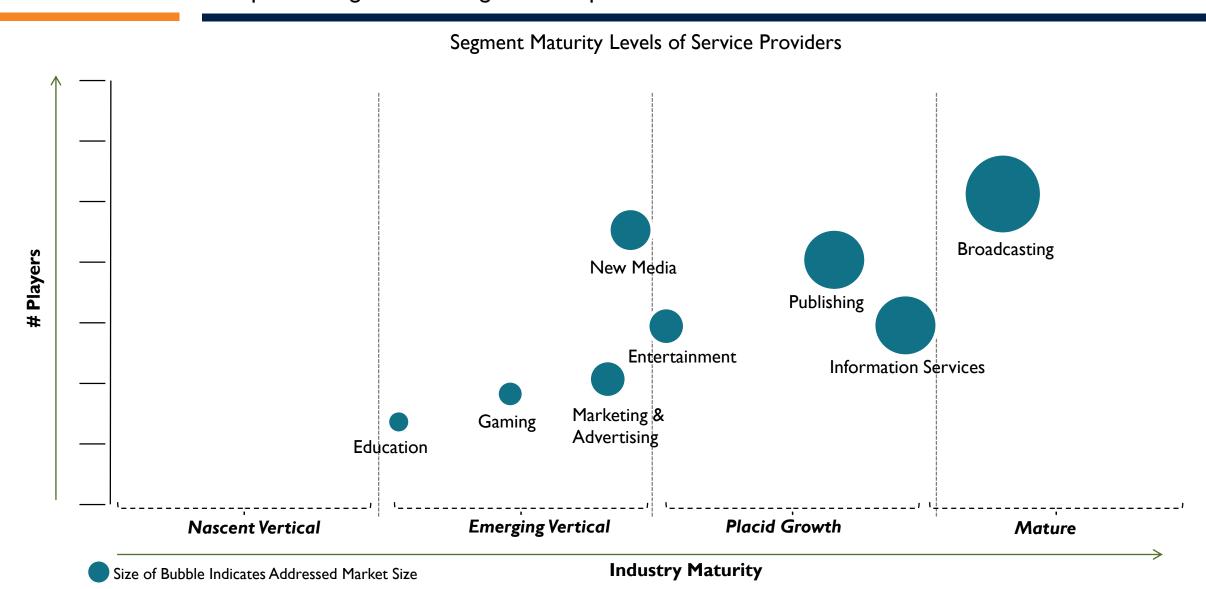
FY 2020(E)
USD
92
Billion





# Broadcasting, Publishing and Information Services are the most mature and competitive segments amongst service providers







## The Drivers For Outsourcing Have Changed Tremendously Over The Last Years And Newer Trends Have Emerged



Ability to reach end consumers directly, providing customized experiences are becoming key investment areas for companies in the media and entertainment space

landscape

Three
Key trends in 2 Media and Entertainment outsourcing

Global media companies are looking at APAC and emerging markets for driving future growth and working with service providers to achieve faster time to market for their products

Service Providers are building end to end capabilities across the media value chain by acquiring niche digital companies or partnering with start-ups

Zinnov Proprietary Confidential Source: Zinnov research & Analysis



# L&T Infotech has been investing significantly to establish itself as one of the most preferred partners in the M&E space



L&T Infotech (LTI) has been rated in the leadership zone in Broadcasting. LTI has a strong service portfolio spanning across digital supply chain, content management and enterprise system transformation making LTI a strong partner for any organization in the Media and Entertainment space

## The primary differentiators that set LTI apart are:

- LTI suite of solution accelerators, particularly across the OTT, Rights & Royalty Management and Content Workflow Management was evaluated as highly mature in the GSPR analysis for the broadcasting space
- > LTI has a well established, wide suite of offerings specific to the customers' needs in Digital Asset Management, Social Analytics and Enterprise Media Management solutions
- > LTI has helped its clients create successful and adaptive businesses by combining digital strategy and customer centric design to achieve scale rapidly





Segment	Key Expertise Areas	Position in Market	Analyst Commentary
Broadcasting	Content Management and BI	Leadership Zone	Very good capabilities in areas of digital distribution, analytics and application development and maintenance across the OTT space
Entertainment	Digital Rights	Execution Zone	LTI is one of the emerging players in the Entertainment services space. Strong expertise across content operations and testing services along with the ability to automate processes makes them well suited for future growth
Publishing	Web Content Management, ADM & Enterprise Systems transformation	Execution Zone	Strong capabilities in ADM, Enterprise Business systems especially in re-platforming and migration and Web Content Management
Education	ERP systems	Execution Zone	An emerging player with a robust in-house cloud ERP solution Campus Next <sup>TM</sup> Zinnov Proprietary Confidential







Segment	Key Expertise Areas	Position in Market	Analyst Commentary
New Media	Product Development	Execution Zone	Sound capabilities in website development, Plugin development and integration
Marketing & Advertising	API Development & Integration	Execution Zone	A strong mix of experience and domain heavy talent pool with knowledge in marketing services and analytics
Information Services	Product Management	Execution Zone	LTI has shown good exposure in delivering engagements in the BI & reporting space. Going forward these areas will be crucial to companies in the information services space



# LTI holds a large suite of IPs, Platforms and Solutions which differentiate it from the other Service Providers



#### **SMC: Smart Media Controller**

**SMC:** Smart Media Controller server is a multi-screen solution for video delivery using adaptive bit rate (ABR) streaming.

#### **Key Features:**

- HLS based advanced adaptive bit rate (ABR) streaming.
- Powered by custom-built media recommendation engine
- Support for linear and overlay banner ad-insertion
- Video bookmarking supported
- Bring Your Own Device(BYOD) support using HTML5 Web UI.
- Integrated with VAST 3.0 complaint ad-server for targeted advertisements.

#### AdWiser SliceCreate & Search

AdWiser Slice Create & Search is a platform to create video time slices and associated metadata & transcript (cc) to enable Ad Decision Systems make contextual in-content decisions. It enables Search, Tag, Retrieve & Repurpose of digital assets.

#### **Key Features:**

- Efficient search engine offering keyword, federated and multilingual search
- Extracts raw data from audio, video and image library for storage
- Ability to export granular slice metadata for use in downstream AD system
- Approval and release workflow for digital video ingests and slices

#### **Benefits:**

- Metadata tagging at 'timecode' level enables Ad Decision Systems
- Close caption search (transcripts) makes spoken content searchable
- On demand creation and transcoding of relevant clips

#### DT Robo

**DTRobo** is an in-house automation framework developed for multi-platform Streaming app and TV app validation.

#### **Key Features:**

- Built in validation algorithm based on Image comparison and OCR
- For video content report provides frame by frame analysis
- Automated video playback capability using IR and BT blaster
- Custom UI to define test cases and to execution a test plan
- Easily scalable to any new platform / OS

#### **Benefits:**

- Easy integration with multiple set top boxes (STBs), resulting in reduction of time-to-market
- Auto-calibration enables easy testing of new customer-specific features and future expansion
- Readily Available Test Coverage for 10 STB Features

## Scriptor

**Scriptor™** is a script review and feedback sharing tool involving a completely paperless and secured workflow process.

### **Key Features:**

- Tablet client module for annotations and Desktop Admin console
- Screening and reviewing scripts for episodes or features
- Content on-the-go, anytime, anywhere
- Document sharing based on user groups and roles
- Authentication of users using LDAP (for employees) and inline
- Offline support to review documents and provide comments
- User specific Watermarking on scripts



Strong solutions portfolio, global presence are key drivers for LTI in the Media and Entertainment space





# **Strengths**

- LTI has been able to successfully leverage its investments in digital content distribution and application development services to deliver key projects in the OTT space
- Ensuring long and deep customer connects, LTI has been able to continuously innovate in areas of Sales and Marketing Analytics and Reporting Application, Digital Rights Administration
- Ability to tweak, enhance existing client platforms by including multiple features is one of the primary differentiators of LTI
- LTI has invested in developing IPs, solutions and accelerators specific to Entertainment space in areas of workflow automation and analytics to meet the end customer requirements

# **Key Opportunities**

- LTI solutions such as Scriptor™ position them to be an ideal partner for companies looking to invest in content workflow and delivery solutions
- LTI can leverage its expertise in content support operations, testing and analytics to cater to the emerging needs of New Media and Online space customers



Source: Zinnov Research & Analysis

# GSPR Broadcasting segment Ratings – 2015



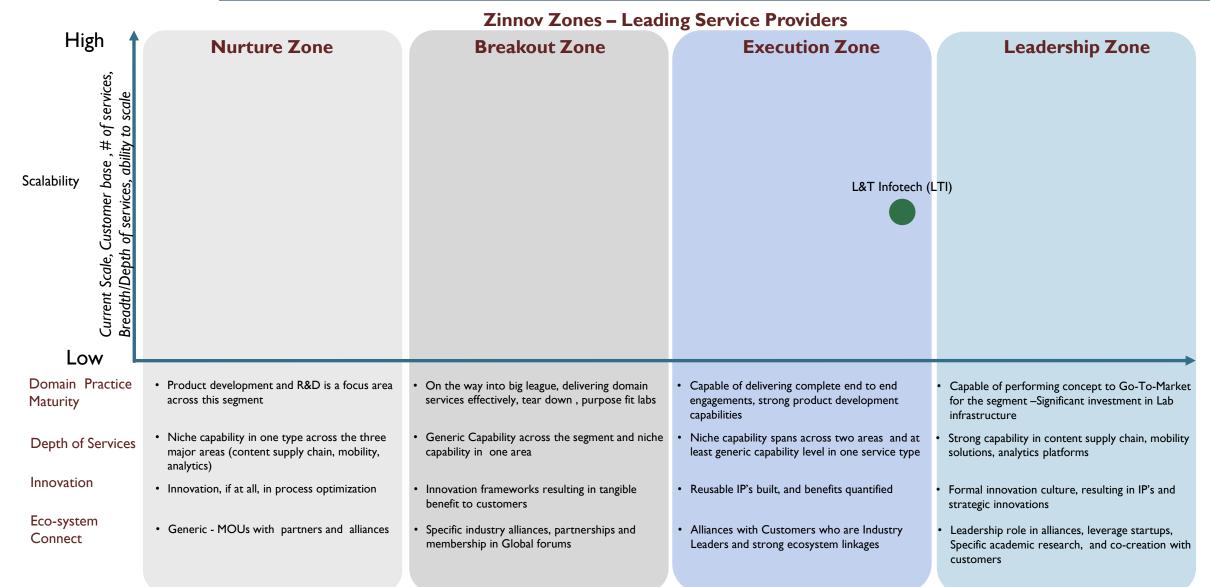
	Zinnov Zones – Leading Service Providers				
Solution of services, ability to scale	Nurture Zone	Breakout Zone	Execution Zone  L&T	Leadership Zone  Infotech (LTI)	
Low				<del></del>	
Domain Practice Maturity	<ul> <li>Product development and R&amp;D is a focus area across this segment</li> </ul>	On the way into big league, delivering domain services effectively, tear down , purpose fit labs	<ul> <li>Capable of delivering complete end to end engagements, strong product development capabilities</li> </ul>	<ul> <li>Capable of performing concept to Go-To-Market for the segment –Significant investment in Lab infrastructure</li> </ul>	
Depth of Services	<ul> <li>Niche capability in one type across the three major areas (content supply chain, mobility, analytics)</li> </ul>	Generic Capability across the segment and niche capability in one area	Niche capability spans across two areas and at least generic capability level in one service type	<ul> <li>Strong capability in content supply chain, mobility solutions, analytics platforms</li> </ul>	
Innovation	Innovation, if at all, in process optimization	Innovation frameworks resulting in tangible benefit to customers	Reusable IP's built, and benefits quantified	<ul> <li>Formal innovation culture, resulting in IP's and strategic innovations</li> </ul>	
Eco-system Connect	Generic - MOUs with partners and alliances	Specific industry alliances, partnerships and membership in Global forums	Alliances with Customers who are Industry Leaders and strong ecosystem linkages	<ul> <li>Leadership role in alliances, leverage startups,</li> <li>Specific academic research, and co-creation with customers</li> </ul>	



Source: Zinnov Research & Analysis

# GSPR Entertainment segment Ratings – 2015





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## GSPR Publishing Services segment Ratings – 2015



#### **Zinnov Zones – Leading Service Providers** High **Nurture Zone Breakout Zone Execution Zone Leadership Zone** Current Scale, Customer base , # of services, Breadth/Depth of services, ability to scale Scalability L&T Infotech (LTI) Low Domain Practice Product development and R&D is a focus area On the way into big league, delivering domain Capable of delivering complete end to end Capable of performing concept to Go-To-Market for the segment -Significant investment in Lab **Maturity** across this segment services effectively, tear down, purpose fit labs engagements, strong product development capabilities infrastructure · Niche capability in one type across the three Generic Capability across the segment and niche Niche capability spans across two areas and at Strong capability in content supply chain, content Depth of Services major areas (content supply chain, content capability in one area least generic capability level in one service type ecosystem, digital distribution and analytics ecosystem, digital distribution and analytics) solutions Innovation • Innovation, if at all, in process optimization Innovation frameworks resulting in tangible Reusable IP's built, and benefits quantified Formal innovation culture, resulting in IP's and benefit to customers strategic innovations **Eco-system** · Alliances with Customers who are Industry Generic - MOUs with partners and alliances Specific industry alliances, partnerships and Leadership role in alliances, leverage startups, Connect Leaders and strong ecosystem linkages membership in Global forums Specific academic research, and co-creation with customers



# GSPR Education segment Ratings – 2015



	Zinnov Zones – Leading Service Providers				
Special Scale, Customer base, # of services, ability to scale	Nurture Zone	Breakout Zone	Execution Zone  L&T Infotech (LTI)	Leadership Zone	
Low				<b>———</b>	
Domain Practice Maturity	<ul> <li>Product development and R&amp;D is a focus area across this segment</li> </ul>	On the way into big league, delivering domain services effectively, tear down , purpose fit labs	Capable of delivering complete end to end engagements, strong product development capabilities	Capable of performing concept to Go-To-Market for the segment –Significant investment in Lab infrastructure	
Depth of Services	<ul> <li>Niche capability in one type across the three major areas (content management services, mobility, analytics, LMS)</li> </ul>	Generic Capability across the segment and niche capability in one area	Niche capability spans across two areas and at least generic capability level in one service type	<ul> <li>Strong capability in content management services, mobility, analytics, LMS solutions</li> </ul>	
Innovation	• Innovation, if at all, in process optimization	Innovation frameworks resulting in tangible benefit to customers	Reusable IP's built, and benefits quantified	Formal innovation culture, resulting in IP's and strategic innovations	
Eco-system Connect	Generic - MOUs with partners and alliances	Specific industry alliances, partnerships and membership in Global forums	Alliances with Customers who are Industry Leaders and strong ecosystem linkages	<ul> <li>Leadership role in alliances, leverage startups,</li> <li>Specific academic research, and co-creation with customers</li> </ul>	



# GSPR New Media segment Ratings – 2015



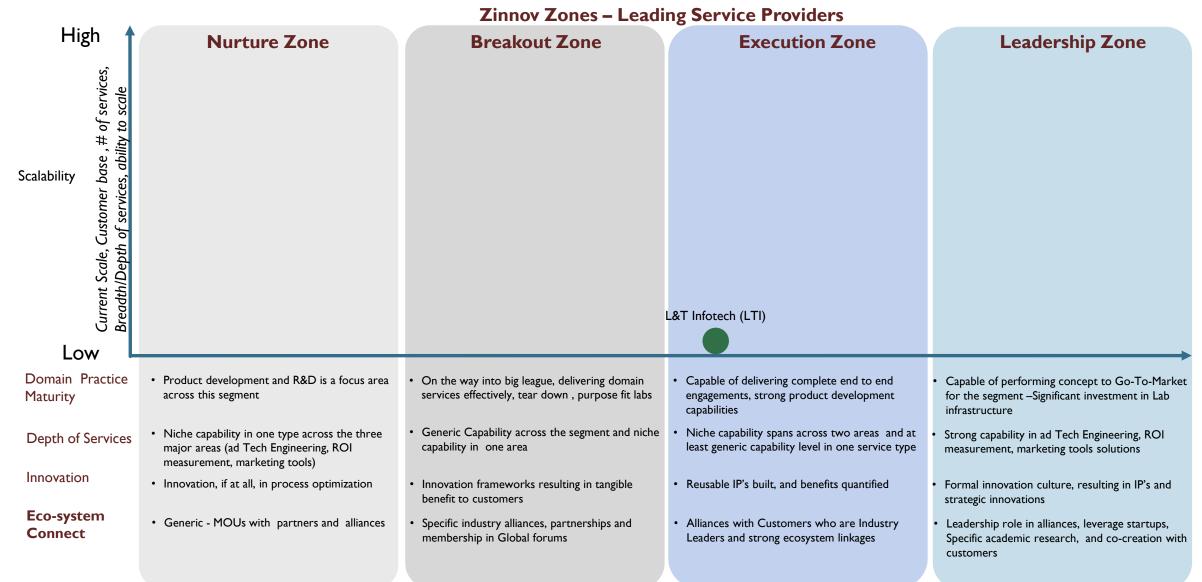
	Zinnov Zones – Leading Service Providers				
Solution Scale, Customer base, # of services, Breadth/Depth of services, ability to scale	Nurture Zone	Breakout Zone	Execution Zone  L&T Infotech (LTI)	Leadership Zone	
Low					
Domain Practice Maturity	<ul> <li>Product development and R&amp;D is a focus area across this segment</li> </ul>	On the way into big league, delivering domain services effectively, tear down , purpose fit labs	<ul> <li>Capable of delivering complete end to end engagements, strong product development capabilities</li> </ul>	<ul> <li>Capable of performing concept to Go-To-Market for the segment –Significant investment in Lab infrastructure</li> </ul>	
Depth of Services	<ul> <li>Niche capability in one type across the three major areas (multi-channel distribution, analytics media planning)</li> </ul>	Generic Capability across the segment and niche capability in one area	Niche capability spans across two areas and at least generic capability level in one service type	<ul> <li>Strong capability in multi-channel distribution, analytics media planning solutions</li> </ul>	
Innovation	• Innovation, if at all, in process optimization	Innovation frameworks resulting in tangible benefit to customers	Reusable IP's built, and benefits quantified	<ul> <li>Formal innovation culture, resulting in IP's and strategic innovations</li> </ul>	
Eco-system Connect	Generic - MOUs with partners and alliances	Specific industry alliances, partnerships and membership in Global forums	Alliances with Customers who are Industry Leaders and strong ecosystem linkages	<ul> <li>Leadership role in alliances, leverage startups,</li> <li>Specific academic research, and co-creation with customers</li> </ul>	



Source: Zinnov Research & Analysis

## GSPR Marketing and Advertising segment Ratings – 2015





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## GSPR Information Services segment Ratings – 2015



#### **Zinnov Zones – Leading Service Providers** High **Nurture Zone Breakout Zone Execution Zone Leadership Zone** Current Scale, Customer base , # of services, Breadth/Depth of services, ability to scale Scalability L&T Infotech (LTI) Low Domain Practice Product development and R&D is a focus area On the way into big league, delivering domain Capable of delivering complete end to end Capable of performing concept to Go-To-Market for the segment -Significant investment in Lab **Maturity** across this segment services effectively, tear down, purpose fit labs engagements, strong product development infrastructure capabilities · Niche capability in one type across the three Generic Capability across the segment and niche Niche capability spans across two areas and at Strong capability in workflow management, Depth of Services major areas (workflow management, editorial, capability in one area least generic capability level in one service type editorial, digitization and analytics solutions digitization and analytics) Innovation • Innovation, if at all, in process optimization Innovation frameworks resulting in tangible Reusable IP's built, and benefits quantified Formal innovation culture, resulting in IP's and benefit to customers strategic innovations **Eco-system** • Generic - MOUs with partners and alliances Specific industry alliances, partnerships and · Alliances with Customers who are Industry Leadership role in alliances, leverage startups, Connect membership in Global forums Leaders and strong ecosystem linkages Specific academic research, and co-creation with customers

# **THANK YOU**