



GLOBAL SERVICE PROVIDER RATINGS, 2015 FOR Media and Entertainment Vertical

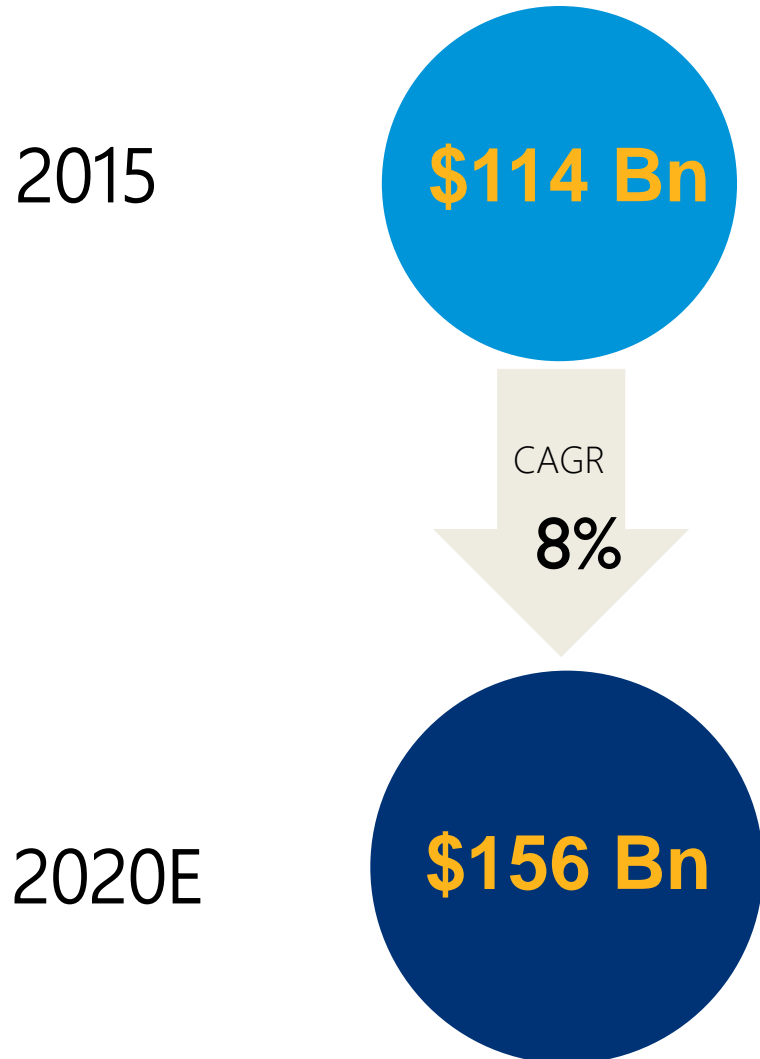
An Analyst Point of View for *L&T Infotech*
August, 2016

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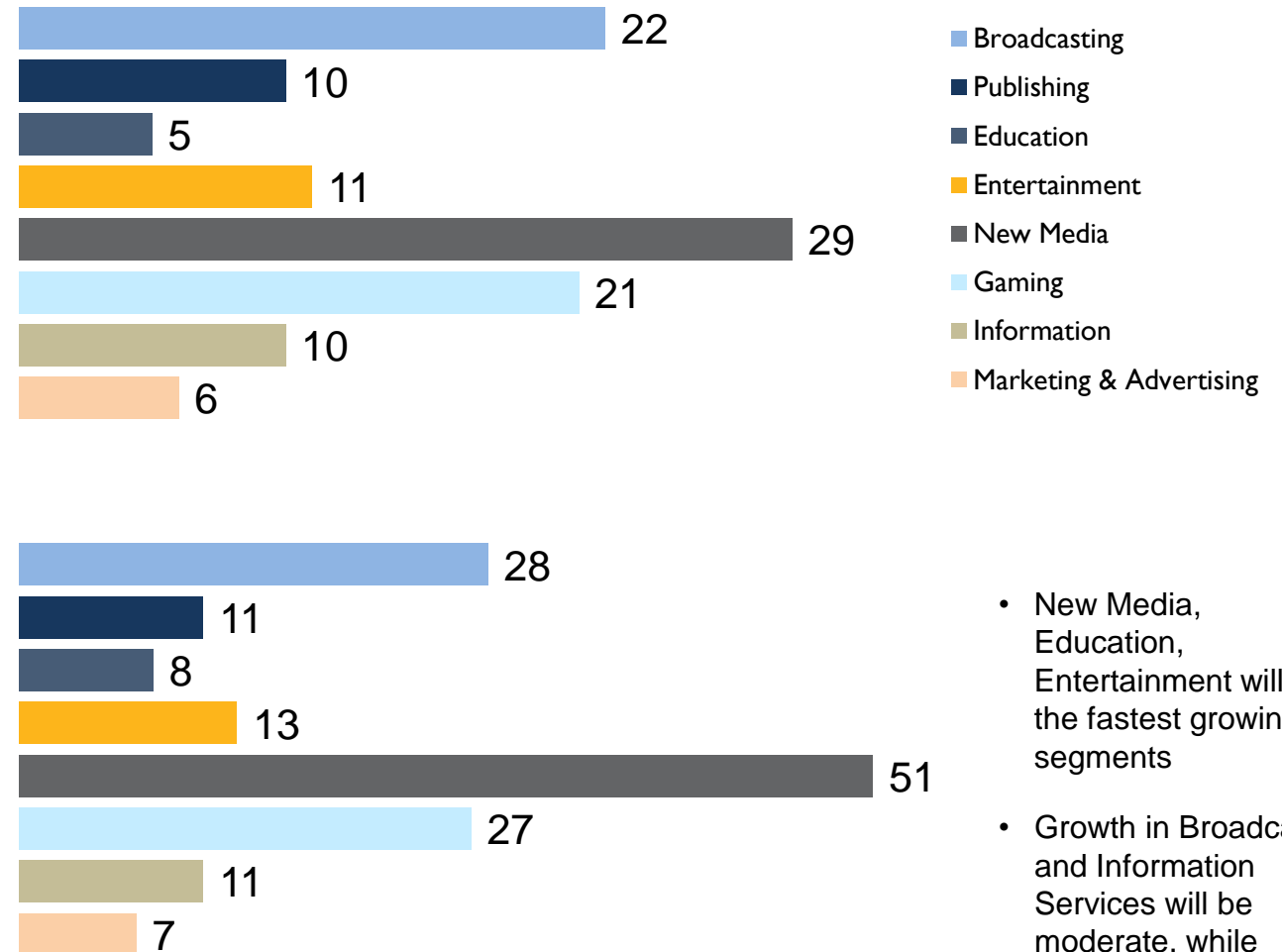
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The total spend on IT and PES by Media and Entertainment companies stand at **USD 114 Billion** (2015), expected to grow at a CAGR of **8%** to reach **USD 156 Billion by 2020**

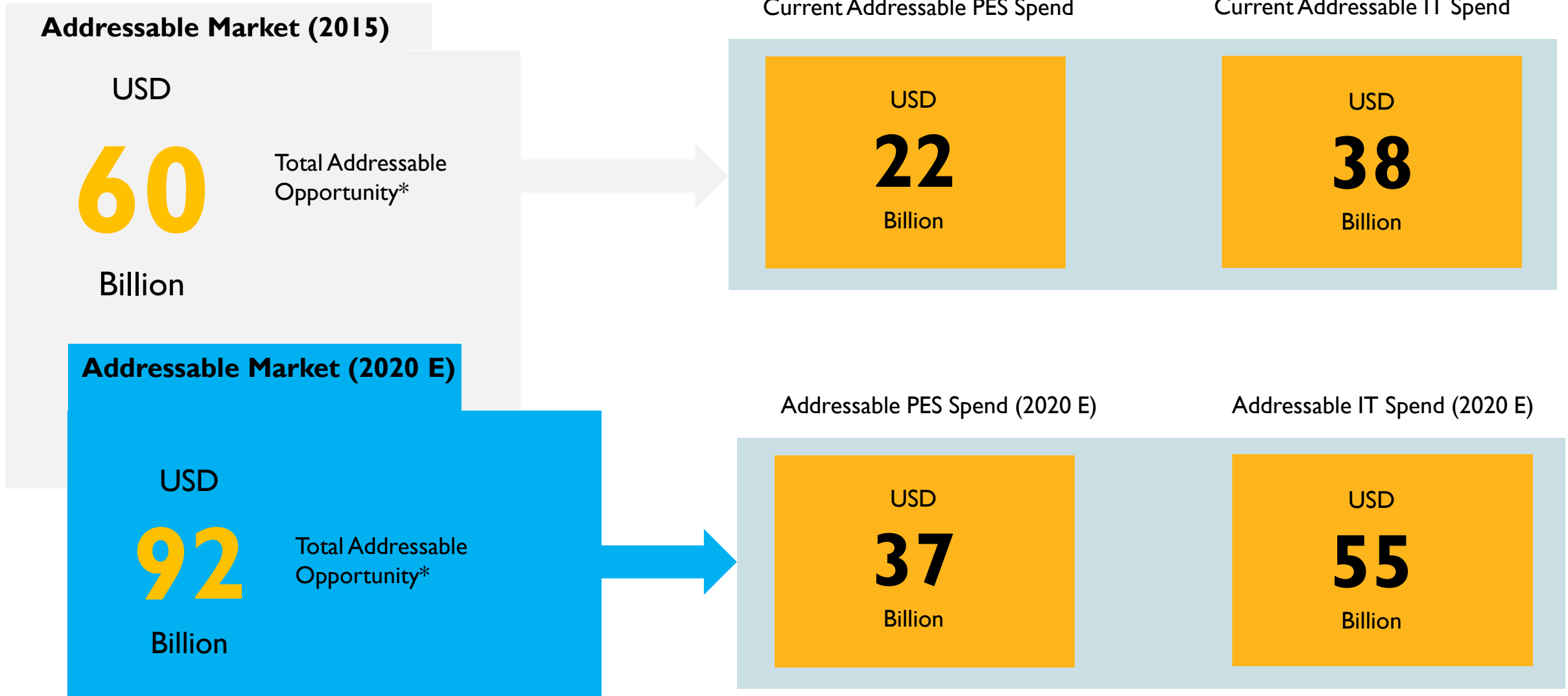
Total PES and IT Spend by M&E companies

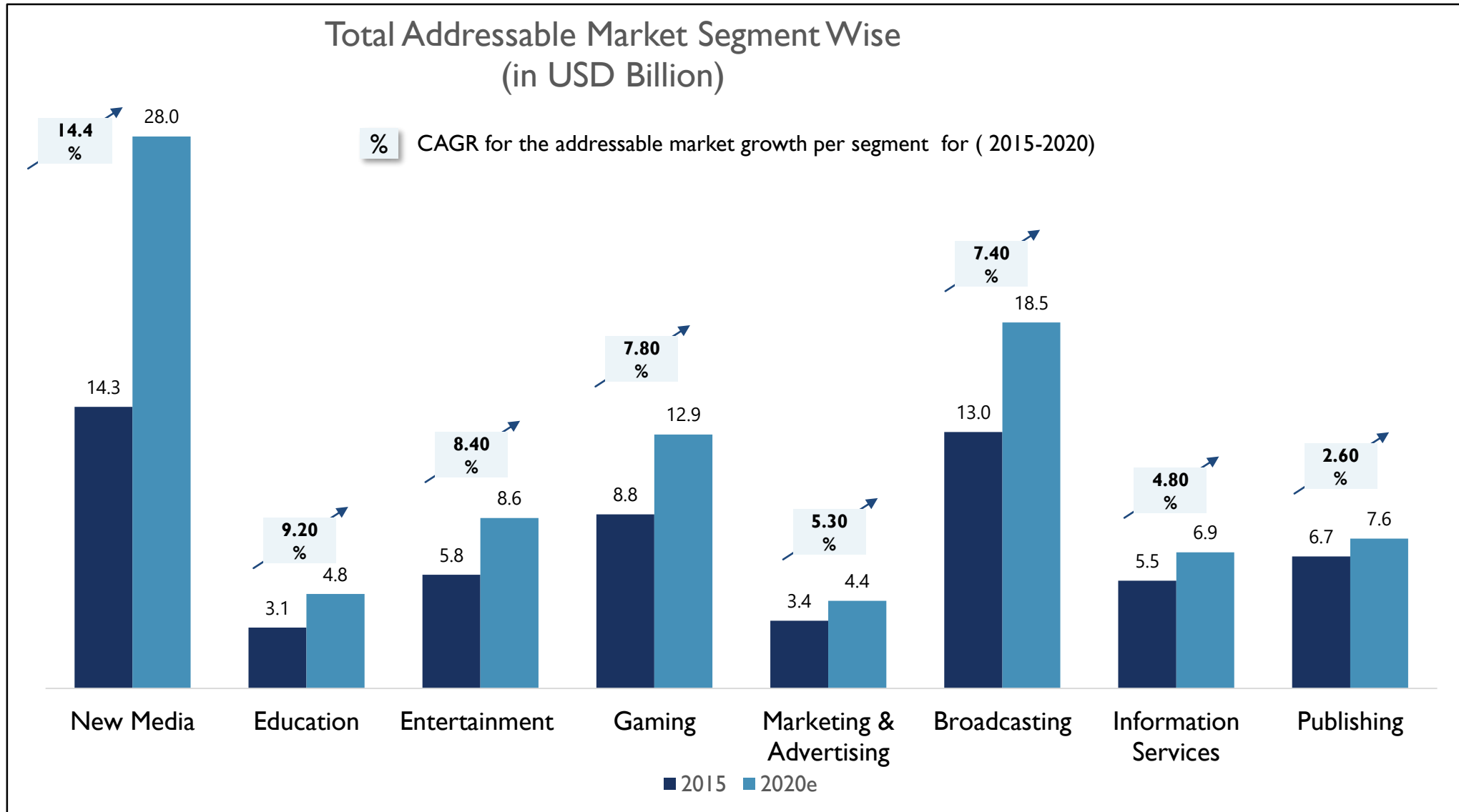
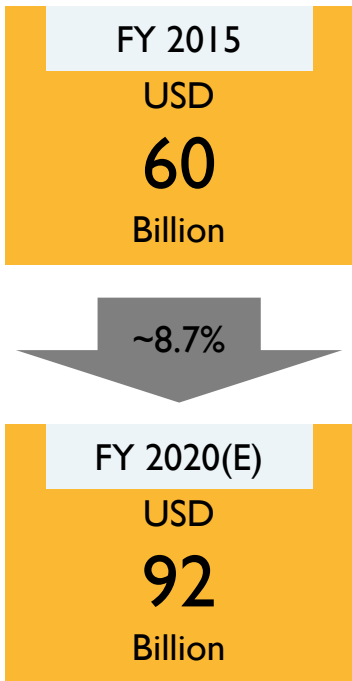


Spend split across media sub-segments (in USD Billion)

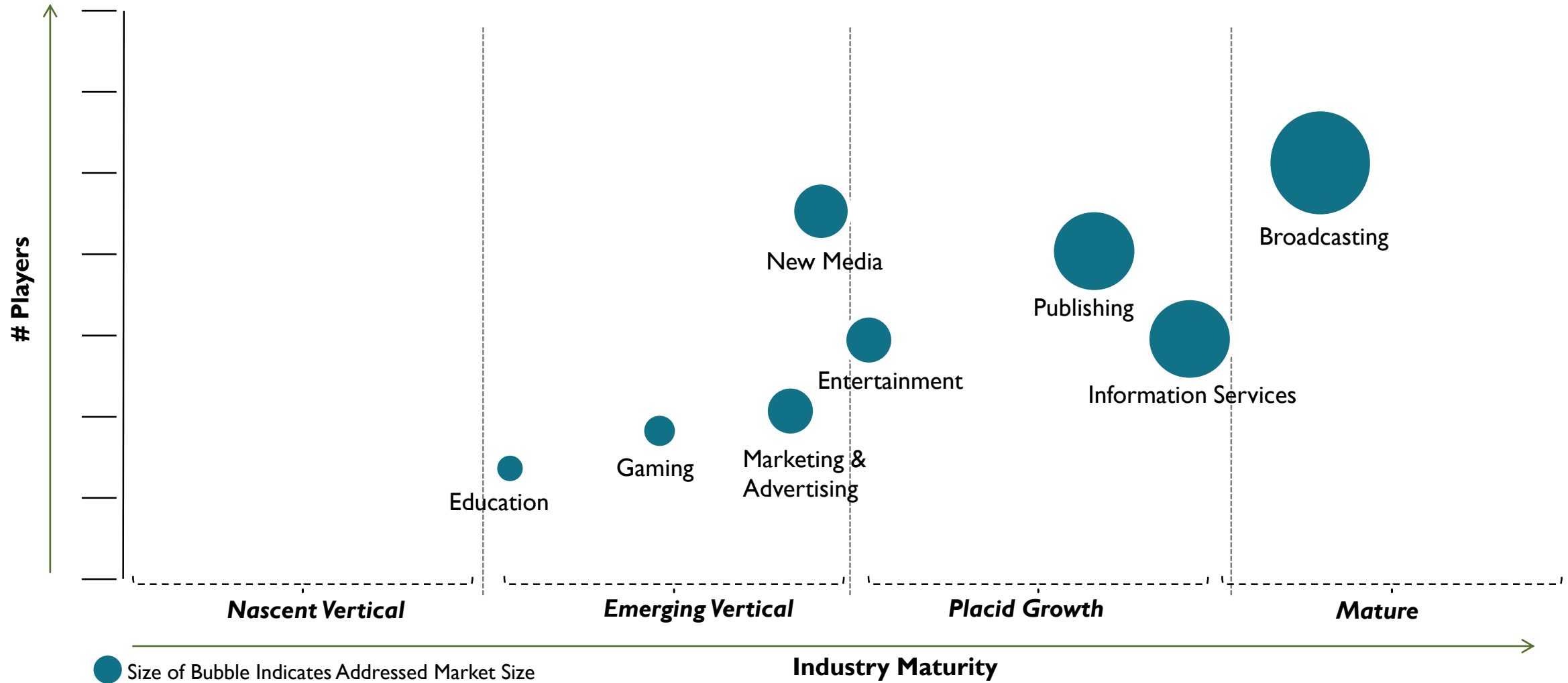


- New Media, Education, Entertainment will be the fastest growing segments
- Growth in Broadcasting and Information Services will be moderate, while traditional publishing will remain stagnant





Segment Maturity Levels of Service Providers



● Size of Bubble Indicates Addressed Market Size

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

Three Key trends in Media and Entertainment outsourcing landscape

2 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

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

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™

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

SMC: Smart Media Controller

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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

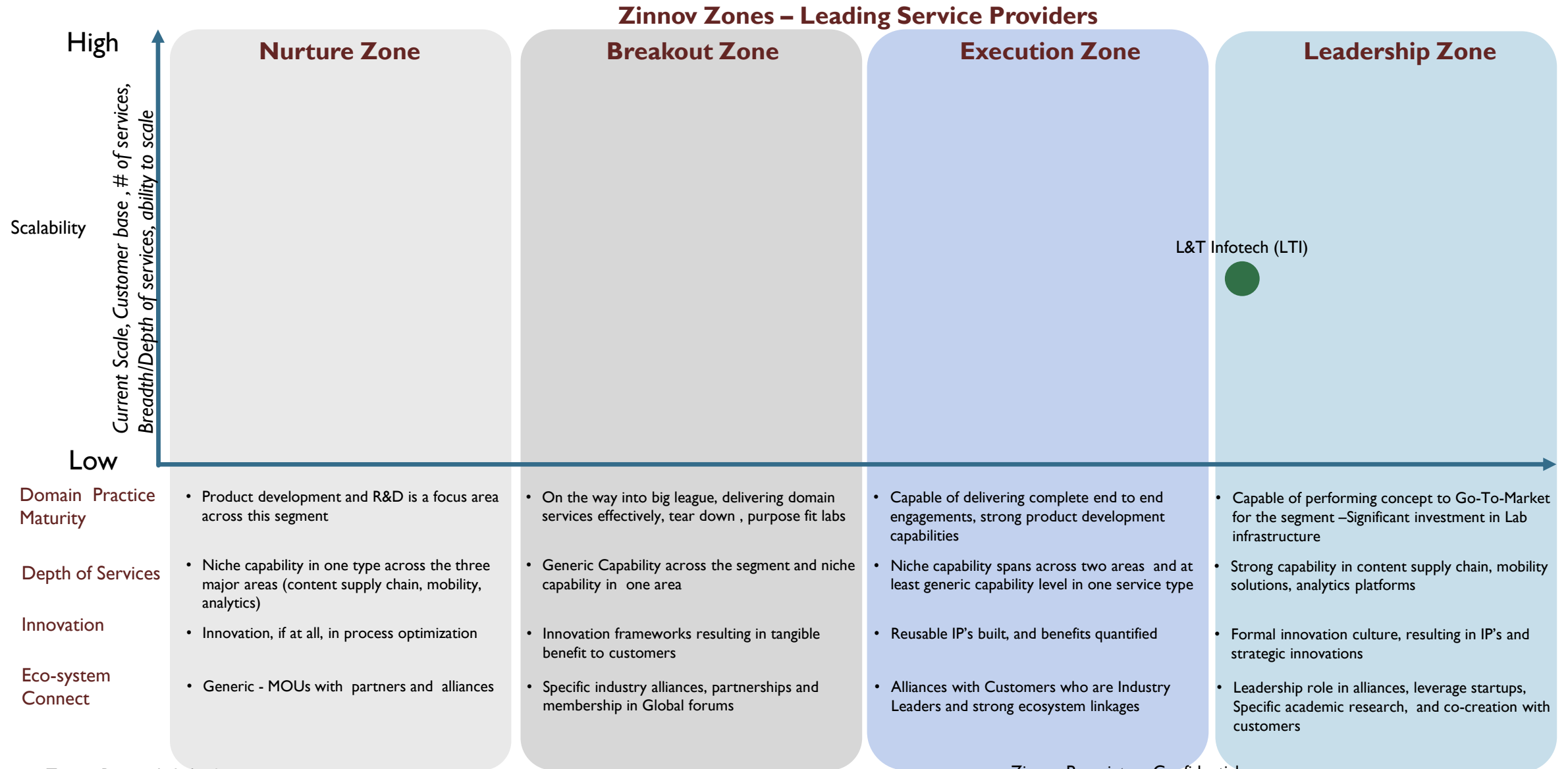


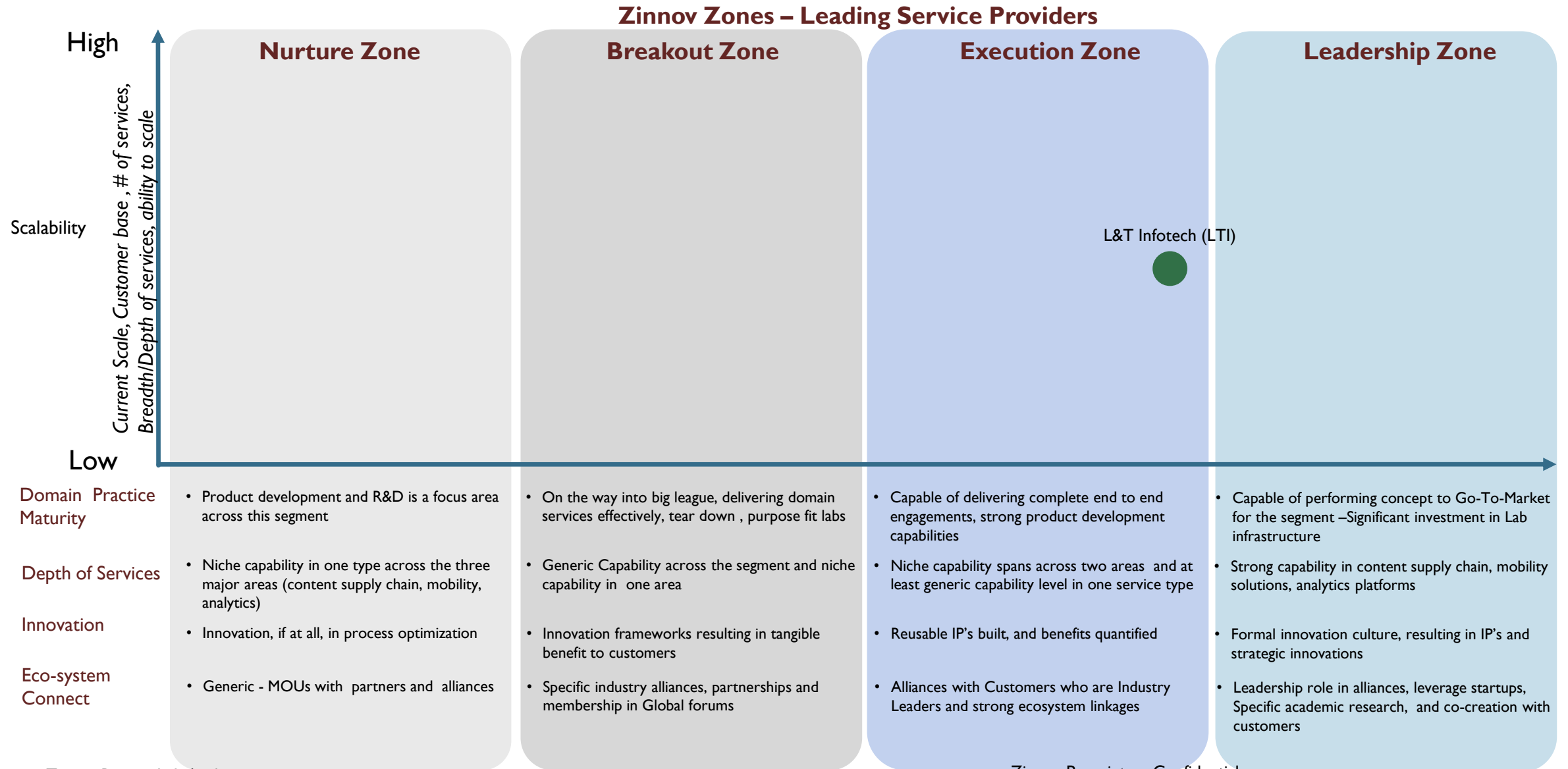
Strengths

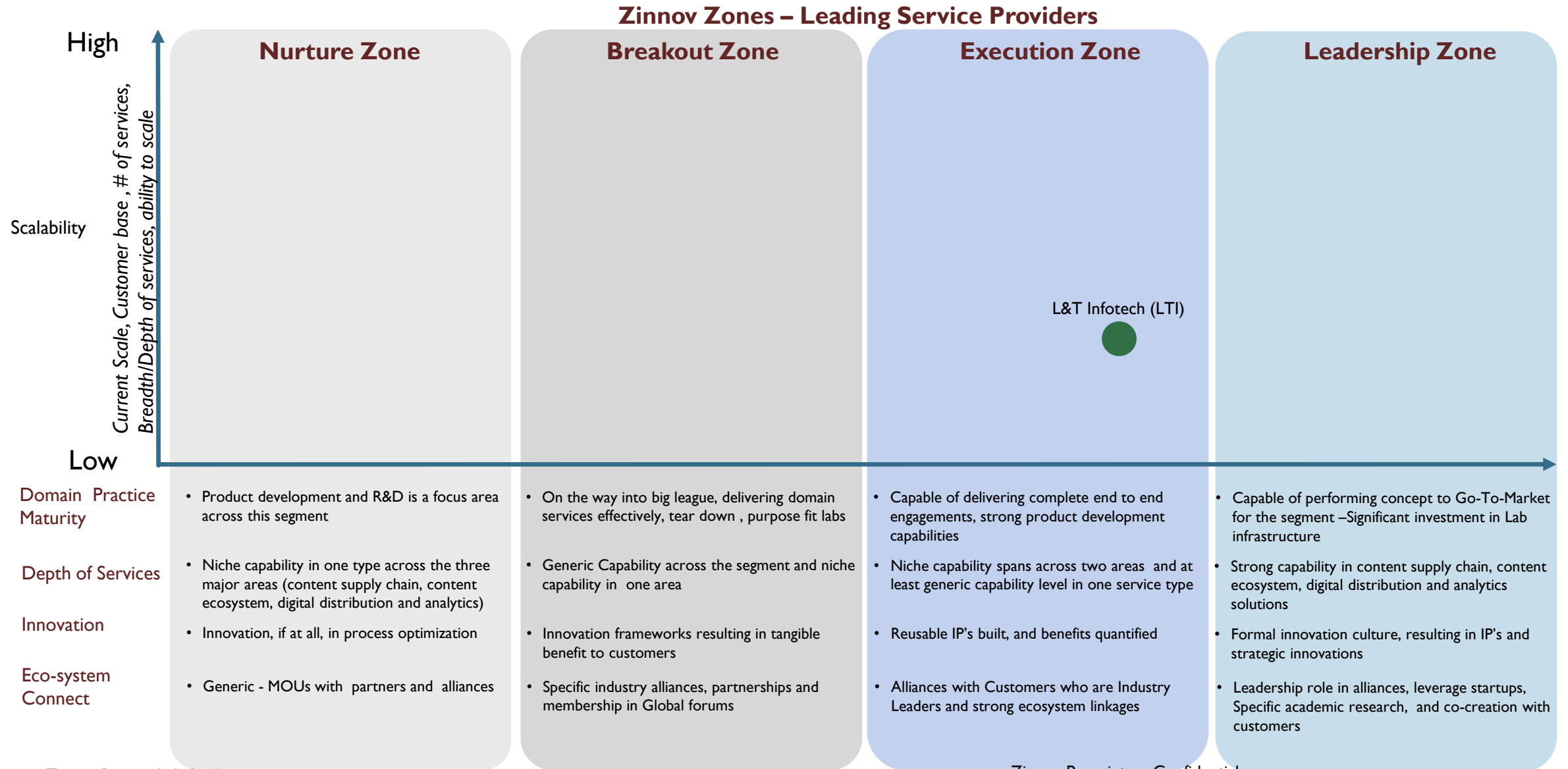
- LTI has been able to successfully leverage its investments in digital content distribution and application development services to deliver key projects in the OTT space
- Ensuring long and deep customer connects, LTI has been able to continuously innovate in areas of Sales and Marketing Analytics and 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

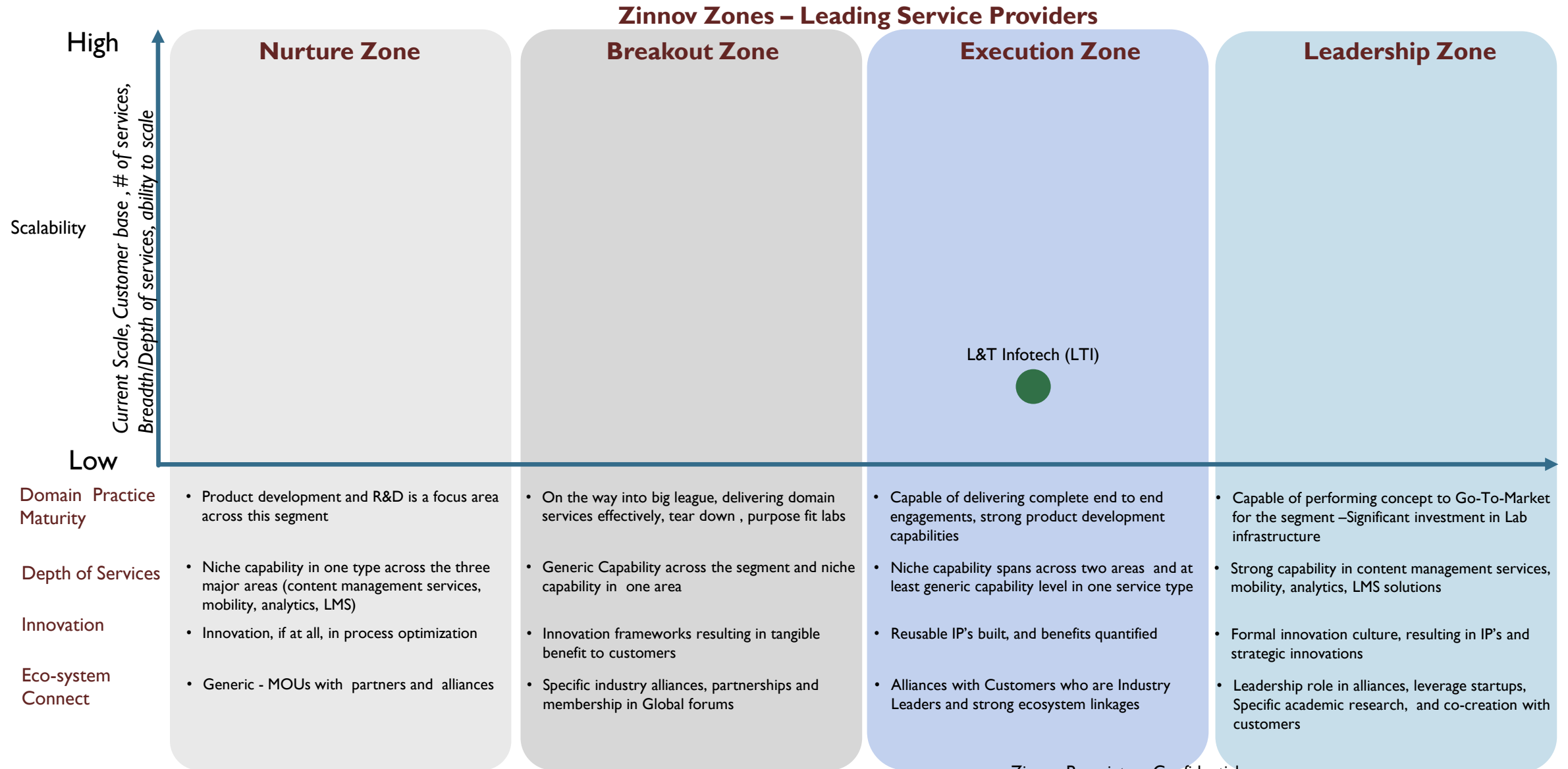
Key Opportunities

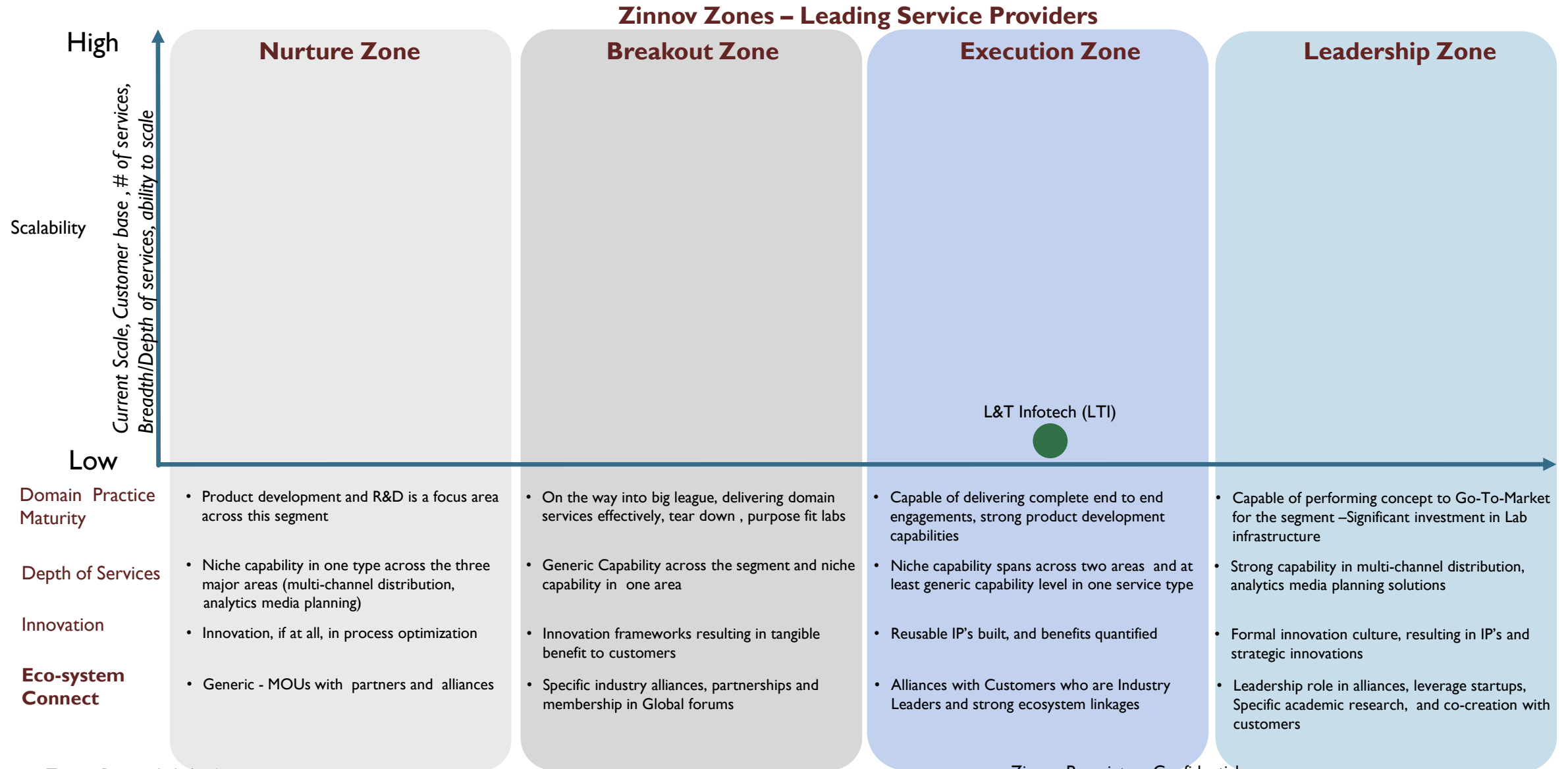
- LTI solutions such as Scriptor™ position them to be an ideal partner for companies looking to invest in content workflow and delivery solutions
- LTI can leverage its expertise in content support operations, testing and analytics to cater to the emerging needs of New Media and Online space customers

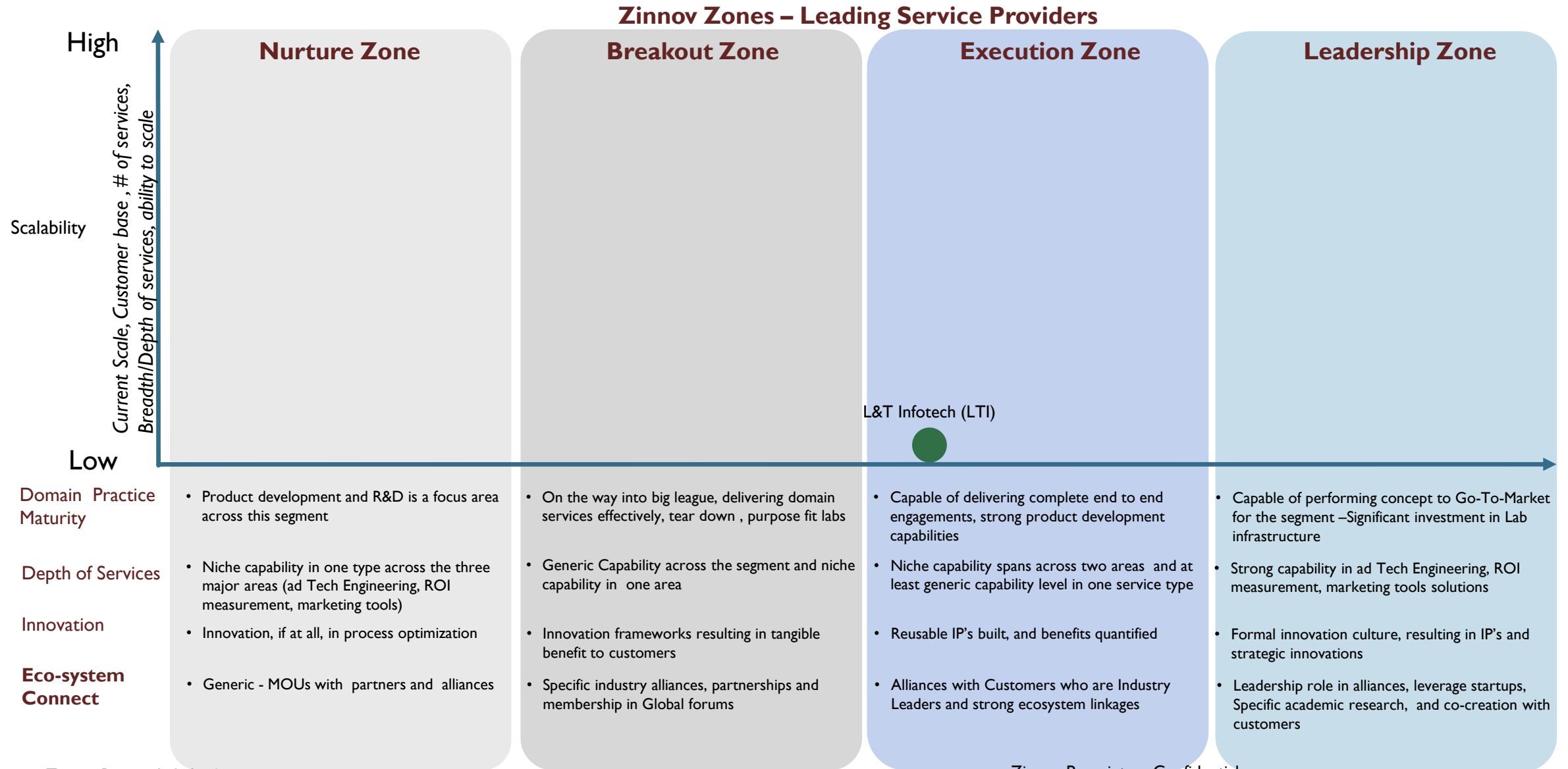


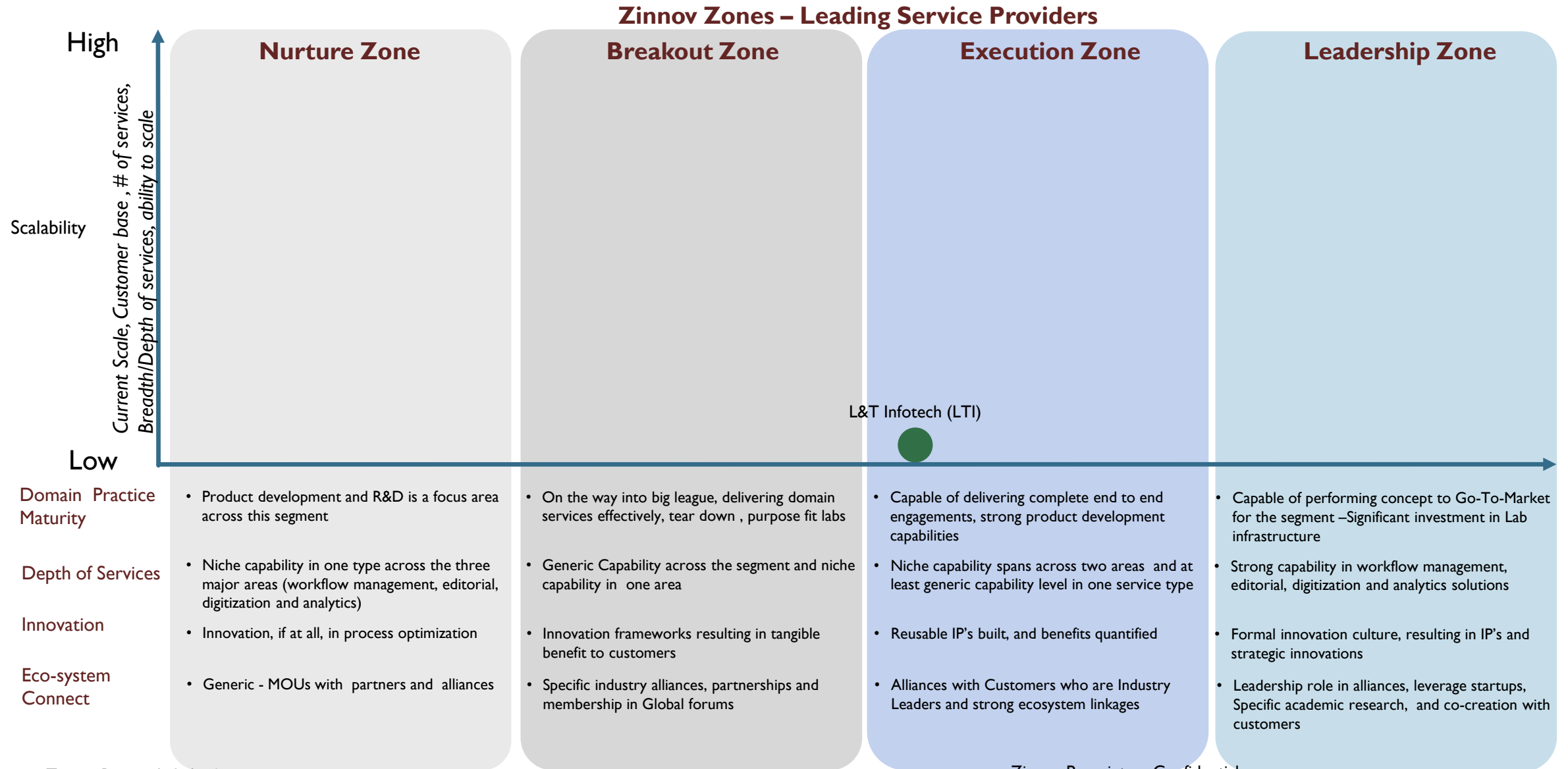












THANK YOU