



Representing broadcast and media technology suppliers worldwide

Welcome to the IABM Annual Review for 2012



The IABM remains the only international trade association for the broadcast and media technology supply sector.

We are the authoritative voice for the industry and provide a wide array of benefits and business tools to assist our members in planning, developing and running their businesses.

It is our remit to both represent the industry and promote it through advocacy, media contact and networking. We provide relevant and timely specific industry intelligence to keep our members informed as to the state of our market and the direction in which it is going. We also provide benchmarking tools for our members.

We are dedicated to developing talent in our sector to ensure the long term health of the broadcast and media technology market and have created a range of high quality, in depth, training courses and engineering student bursaries.

I hope when you read this Annual Review you can see how the IABM is developing and changing to provide even more value for money for its membership and to mirror the ever changing landscape of our sector.

The IABM would like to thank you for your support throughout the year and we look forward to engaging with you in 2013.



Peter White
Director General

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Benefits for members

Networking & Events

- IABM Annual Conference
- Regional member meetings
- Exclusive member only receptions
- Executive breakfast briefings
- Golf days

Discounts

Discounts

- Exhibitions across the globe
- Trade Publications
- IABM Training courses

Technology Services

Technology Services

- Technology webinars
- Technical advisory service
- Monthly technical bulletins
- Regular updates on legislation
- IABM Training

Market Intelligence

Market Intelligence

- Industry Index tracking reported financial data
- Trends Survey looking at senior executive forecasts
- Global market valuation report
- IABM End-User Survey tracking broadcasters' opinions, trends and purchasing priorities
- Big Broadcast Survey & Global Market Report from Devoncroft Partners
- Benchmark Report enabling member companies to compare their own performance with the sector as a whole and with related sectors.

Resources

Resources

- Daily industry news feed – all the latest press releases in one place
- International Industry Events Calendar
- Monthly E-news
- Quarterly Journal
- Website – access to a wealth of Information
- Intellectual Property advice and information
- Access to complimentary meeting rooms at a selection of exhibitions.



Representing broadcast and media technology suppliers worldwide

info@theiabm.org www.theiabm.org

For full details on all IABM Member benefits and discounts see www.theiamb.org/benefits

Regional Exhibitions Review

The IABM supports a number of regional exhibitions which are recommended to members as key events. We are pleased to provide more information regarding a number of these based on our experience this year.

BIRTV (www.birtv.com)

BIRTV was held in Beijing over four days in August and proved to be an important event in the exhibition calendar, with around 500 exhibitors and a claimed attendance up by 5% from 50,000 last year. In contrast to CCBN which is orientated towards distribution, BIRTV majors on production. It is a national show but with a country the size of China, represents an important and growing opportunity.

The exhibition spreads across 10 halls with international booths mostly grouped in two, one for video and the other for audio. 38 IABM members exhibited with a further 30 member companies identified on dealer booths.

Unfortunately the background infrastructure and facilities are a weakness due to the ageing exhibition halls. The organisers are aware (in part based upon IABM feedback) but have failed so far to find a better venue.

Once again the IABM was invited to give a keynote speech to more than 500 conference delegates. This overviewed the worldwide broadcast and media business situation plus a review of technology trends.

The IABM hosted a reception at a nearby hotel at which 46 members and guests attended. These receptions have proved popular, providing members an opportunity to network and share initial experiences of the show.

Throughout the exhibition the IABM booth provided meeting facilities, Internet access and a focus for membership enquiries.

Exhibitors and visitors considering attending BIRTV for the first time can contact the IABM for further information as the nature of the show is quite different to other exhibitions.



Inter BEE (www.inter-bee.com)

Inter BEE is held over three days in November. Published statistics claim 871 companies and organisations exhibiting with 31,857 visitors. The economic climate in Japan is clearly under pressure, perhaps more so than many other parts of the world.

The economic situation is reflected in the size of the show, with an impression of smaller booths and fewer halls compared to the most successful years. Overseas registrations represented just 2.5% of the visitors. Several non-Japanese IABM members having previously hosted dedicated booths decided to work through distributors this year. There are exceptions, with a few new companies exhibiting for the first time.

There is no doubt that Inter BEE remains an important national show in a country hosting the headquarters of some of the most significant equipment suppliers. The IABM Global Market Valuation values the local market at \$1bn.

The facilities are good with high quality International local hotels within walking distance. The location is Makuhari Messe, Chiba, a purpose-built modern exhibition centre, midway between Narita International Airport and Tokyo.

Despite austerity Japan is still a pioneer in broadcast technology and this year there was a clear emphasis on “Beyond HD” including higher resolutions; 4K and Super Hi-Vision. NHK, the state broadcaster, drives much of

this and still retains a substantial research resource.

IABM activities included a keynote speech at the conference “The Broadcast and Media Industry Business & Technology Outlook” which proved very popular and well attended, participation in the “ribbon cutting” opening ceremony and a booth providing support to members and information for visitors.

“We get discounts on exhibiting at various shows which goes some way to contributing towards the cost of our IABM membership and that is a real tangible benefit.”

Broadcast India

Broadcast India, was recently reviewed on the IABM blog (www.theiabmblog.org) by Chris Exelby of TSL Professional Products, one of our Exhibition TaskGroup members.

CSTB (www.cstb.ru)

CSTB was held over three days in February (January in 2013) at the Crocus Expo Pavilion One in Moscow. The show represents all aspects of the cable and satellite distribution and delivery industry within Russia, these far outweighing the number of viewers and choice that is available from terrestrial television. The show, as in previous years, included all aspects of broadcast distribution including equipment manufacturers/suppliers, system integrators and also channel operators and content providers ... literally a one-stop shop. The event offers both a comprehensive exhibition and conference.

The exhibition occupied three halls that represented a gross exhibition area of approximately 18,000 square metres. Added to this were four associated conference halls of which three were in use all of the time. In total, the number of exhibitors with stands was 410 with an additional 73 taken by various representations of the press, an increase from 2011. Of the total exhibitors 44 were new exhibitors who were not present last year.

The increased number of exhibitors and visitors at CSTB confirms that the Russian market does not appear to be significantly affected by global downturn. All visitors are professionals within the industry and the show saw over 25,000 visitors this year. In summary a well-attended show and one that, although does not represent the production side of the industry, should be of value to IABM members interested in the represented sector of the Russian market.

CCW (www.ccwexpo.com)

The 2012 Content & Communications World Conference was held at the Jacob Javits Convention Center in New York City. The show opened one week post Super Storm Sandy which was a major accomplishment given the flooding and power outages in the City and surrounding areas.

CCW is a well regarded regional show that draws from the North East region of the USA. Over 300 exhibitors participated and foot traffic was steady with over 5,000 visitors. There was initial concern from exhibitors that attendance would be affected by the storm, but that was not the case.



Over 150 speakers addressed the latest trends in content creation, management, distribution and delivery. Leadership from ABC, CBS, ESPN, HBO, NBC and A&E, as well as filmmakers and editors, were present and delivered presentations.

The two day show proved just the right amount of time for industry executives and sales teams to conduct business with all of the key players.

SMPTE (www.smpte.org)

Hollywood, California is the home of the SMPTE Show, which was held in October at the Lowes Hotel. The facility is an open-air property with views of the iconic Hollywood sign and next door to the Dolby Theater. The Hollywood and Highland area of California proved a convenient location for all attendees.

The conference is the premier annual event for motion imaging and media technology, production and operations. Located in a large ballroom, the room was a sell out with 70 exhibitors whose area of expertise included cinema and film and the broadcast industry. A third of the attendees were IABM members.

Technical papers were presented throughout the day and much of the conference talk was geared toward industry standards and innovation. The pace of the show is a constant stream of technical experts and sales staffs.

Exhibition Task Group

The ETG reviews and reports on the performance of trade shows and other relevant events that are important to our industry. The group also recommends which exhibitions the IABM should lend its official support to. While there is a regular convening group, open meetings are also held where all IABM members may attend. The ETG often meets at exhibitions to encourage a diverse range of members to join. We also try and help any IABM members with queries about any of the trade shows in our industry. **To find out how you can get involved or for more information please contact lucinda.meek@theiabm.org**

Regional Member Meetings

Throughout the year the IABM organise a number of member days. These events rarely provide instant solutions but they do enable issues critical to the supply community to be aired, debated and provide a framework for further action by the IABM and its members.



Europe

Following successful member days in North America and the UK, the IABM team headed to Germany and Belgium to meet up with local member companies during October.

In Cologne, Germany we were hosted by arvato Systems (S4M) and EVS in Liege, Belgium. Both companies were excellent hosts and welcomed us and other member companies to their headquarters.

As well as standard member day agenda items each host company was given time to share best practice in their current activities. At EVS attendees were treated to an exciting overview of their participation in the Olympics games. arvato addressed many industries with their business process solutions covering for example; automotive, banks, healthcare and consumer goods sectors.

The two locations in Germany and Belgium were selected because of member companies in the region but it is clear other parts of the world should be considered for future meetings.

UK

In early July representatives of more than 50 UK IABM member companies met for a day of discussion. Much of the value came from the opportunities to talk informally over coffee and lunch.

A variety of engaging topics were discussed throughout the day including statistics on the health of the industry, skills and training, technology, exporting support for British companies and a lively debate regarding the value of exhibitions.



North America

In late June, we held two member days in the USA: in Boston on the East Coast and San Francisco on the West Coast. The IABM was represented by John Ive, Joe Zaller and Holly Cuellar who led a packed programme containing market intelligence, exhibition news, an update of all IABM activities and of course time for participants to network and get to know other members from the region.

Dolby kindly provided the venue for the San Francisco meeting and allowed our delegates a special tour of their facility which was greatly enjoyed and appreciated

Regional member meetings 2013

North America – 3-7 June 2013

UK – 3 July 2013

Europe – 3 October 2013

Industry Recognition

The IABM holds a number of different awards programmes throughout the year which aim to promote both our industry and the innovative technology developed within it.

IABM Game-Changer Awards

The new Game-Changers Awards were launched at NAB 2012 and recognise products and services launched at the show that have the potential to revolutionise the broadcast and media technology industry. 2012 winners were:-

- Blackmagic – Cinema Camera
- CAST Group – BlackTrax 6D
- Dolby Laboratories – 3D
- Quantel – revolutionQ
- Sony – HDC-2500

Entry for the 2013 awards are now open, entry forms can be found at www.theiabm.org/gamechangers



IABM Awards for Design and Innovation

The IABM Awards for Excellence in Design and Innovation recognise products that offer significant solutions or new opportunities to the broadcast supply industry.

The top scoring five products are then demonstrated to our judges during the IBC exhibition in Amsterdam in September.

The winners of the Awards for Design & Innovation 2012 were:-

- Canon
- Timecode Systems
- Civolution
- GlenSound Electronics
- Sony

All were awarded with an IABM Award for Excellence. After a tough judging process the prestigious **Peter Wayne Award** was presented to **Timecode Systems** for their **Timecode Buddy**.



Honary Membership

David MacGregor, a key figure in the IABM's creation and growth over the past four decades, was awarded a honorary membership this September. Honorary IABM membership recognises his ongoing support of the IABM and its activities, as well as his exceptional personal contribution to the supply side of the broadcast media and technology industry.

David has served on the IABM committee since the organisation's inception in the 1970s and became a director with its incorporation in 1998. He took over as chairman in 2001 and, having completed his tenure in that role, continues to serve on the IABM board through the present time.



IABM Engineering Student Awards

The Engineering Student Awards are part of the IABM's global training initiative, a growing and evolving programme that was created to help increase the industry's available pool of skilled broadcast engineers and technical staff. The awards programme, is open to any student undertaking a full-time course of study directly related to broadcast engineering and media technology. Winners are selected based on a 500-word essay explaining how the student would be able to benefit from attending IBC. Each award winner receives funding to cover travel, accommodation, and daily expenses for a five-day trip to Amsterdam to attend the IBC conference and exhibition.

"I had no idea just how valuable participating in the event would be for me – not only in terms of what I would gain from all the exposure to new technologies but also in terms of how valuable it is to network with other industry individuals.."

IABM Engineering Student bursary recipient

IABM Annual Conference 2012 Review

Record attendance and great interaction

With Europe once again in economic disarray and confidence in North America faltering, the scene was set for a rather depressing event. Fortunately challenging times brought the best out of the delegates and speakers, leading to one of the most informative and lively events in recent years.

The importance of the IABM Annual Conference was underlined by a record attendance, with almost 140 delegates registered and increased international participation. So it was a full capacity conference held in the centre of historic and picturesque Windsor, just a few steps away from the gates of the castle.

The challenging financial and business climate, plus decreasing margins, was ever present as the backdrop but this was not a conference that dwelt on the past or insurmountable barriers. The debate rapidly moved on to a more upbeat tone with speakers and panellists sharing their views on strategies to make the most of the opportunities.

Peter White, in his opening address, laid out the facts about the business environment and interestingly benchmarked the professional broadcast and media sector against other technology led industries. His analysis demonstrated the broadcast and media sector to be performing in many cases better than broader based technology and comms equipment, but underperforming against businesses based upon technical software. Two critical areas were inventory and receivable days which Peter stated needed attention with both negatively impacting overall performance.

Benchmarking against other industries proved to be a topic of significant interest with the conference being the platform to announce the IABM's intention to provide these figures on a regular basis. Members can then see how the industry as a whole compares, but more importantly they can use

their own data to benchmark themselves against industry averages.

As another part of the "scene setting" for the conference, Silverwood Partners presented a fascinating "Investment Banker's Perspective" of the industry. Despite the gloomy economic outlook they started by declaring more reasons for optimism than pessimism when looking forward to 2013. Industry evolution towards new technology and companies strengthening through mergers and acquisitions will, in their view, fuel business and improved performance.

Silverwood put forward the case that where revenue opportunities exist they will not all go to the much feared IT sector. The broadcast and media industry is still too small and specialised to attract full on attention from companies such as Microsoft, Google and Apple. They are "focused on a broader use case for technology". A further clear message is that software and services are sectors to follow. For some, staying with traditional hardware is likely to lead to chasing sales in a shrinking market.

Close attention was paid to Silverwood's thoughts about "What interests public market investors". Clearly some companies are considering radical measures to grow their business or more pragmatically improve their chances of survival.

A review of mergers and acquisitions over the past year revealed a high level of activity, summarised as an industry that has: "Tremendous deal activity, strategic transactions, money available for attractive businesses and heightened private equity interest". Overall a positive outlook for some companies looking beyond sales and marketing tactics.

Alain Andreoli, President and CEO of Grass Valley captivated the audience with a very frank and radical view of evolution within the sector. He challenged the audience to accept the realities and "Adapt or die". What followed was an illuminating view of how technology has evolved and the role that evolution has played in the IT industry. His message summarised as



“If you think the broadcast industry is still unique and different and what other industries have experienced are not applicable, think again”. Suppliers need to evolve from “Champions of the unique into a smaller crew of inter-operative, end-to-end, open solution providers” with “our industry facing its deepest transformation ever”.

Alain endorsed the increasing importance of software but added to that the need for vendors to respond to end-user demands for interoperability.

On the topic of end-users, the first day ended with a fascinating view from the end-users themselves. An interview with John Maxwell-Hobbs from the BBC was followed by a panel discussion fronted by three further representatives of the end-user community. It was this session that highlighted the daunting decisions required, as expensive infrastructures are replaced with new file-based systems which are far from mature. This is what keeps a Chief Engineer awake at night!

We were further informed that suppliers often do a poor job of presenting their products and services. This industry is no longer just about technology and product features. Potential customers need to be consulted in ways that are meaningful. This includes factors such as workflow efficiency, seamless interoperability, return on investment and cost of ownership.

After a glorious IABM conference dinner and excellent networking, day 2 started on a high note. Pete Cohen an accomplished professional business coach, public speaker, TV presenter, consultant and author treated everyone to an amusing but poignant presentation designed to inspire a more confident and pro-active approach to our business lives. Many executives will have returned to their offices with the resolve needed to do things differently.

New for this year’s conference was a session dedicated to the younger generation. The under 25 year-olds described their approach to media consumption and their first impressions of employment within the broadcast and media sector. A radical departure from senior executives claiming to understand the younger generation, with the audience having a unique opportunity to hear and learn from three “qualified” panellists. Media consumption is clearly changing with the traditional TV being just one of many devices for video and audio entertainment.

On the topic of employment and skills, making our industry attractive must start right back in schools and



through university. Current educational establishments, it would seem, do a poor job of exposing students to the range of career opportunities.

The morning coffee break was followed by a treat, especially for the international delegates, with a march past of the Windsor Palace guards resplendent in their bright red uniforms!

“ The IABM annual conference is really useful to us for networking and building up our relationships with partners, vendors, systems integrators and consultants. ”

Emphasising the positive opportunities to grow and prosper, COO Janne T. Morstol gave a fascinating account of how T-VIPS grew from 11 founding members to a well-respected industry supplier, exploiting the increasing trend towards IP networks for contribution and distribution of TV signals. From the first orders in

2006 to the present day, they have focused on several key aspects, including core competences, investors, routes to market, strategic customers plus product and brand leadership.

The closing debate highlighted the potential for IT technology to revolutionise broadcast and media technology infrastructure. The nature of these new systems, including increasing use of cloud services, will result in systems that bear little resemblance to existing solutions. The most challenging aspect is to think differently and not to apply old ways of working to new workflows. The discussion did however present the impression that everyone is on a steep learning curve with mistakes along the way inevitable, a tough message when large sums of money are needed to develop and implement these solutions!

“ There’s a comprehensive programme of workshops and conferences which we participate in. The content is always relevant and it’s an excellent networking opportunity for us. ”

Once again the IABM conference succeeded in presenting the broadcast and TV industry in an entirely different perspective from conventional commercial conferences. The focus on business and technology, plus the relationship between suppliers and end users, provides a unique opportunity for delegates to think seriously about the right strategy for their organisation going forward.

Our 2013 conference will take place on 5th & 6th December and we look forward to seeing you.

IABM Members listing

A

AA Media Group
Abakus
Acorn Technologies
Actus Digital
Agama Technologies
Alias Hire
Alpermann + Velte Electronic Engineering
Alphatron Broadcast Electronics
Altera
Amberfin
Amos - Spacecom
ANNOVA Systems
Anton/Bauer
AP ENPS
Appear TV
Ardis Technologies
ARG ElectroDesign
Argosy
Arkivum
artec technologies
arvato Systems S4M
Aspen Media
Aspera
ATEME
ATG Broadcast
Atomos
Autocue Group
Autoscript
AVC Electronics
Avenger
Avid
Axon Digital Design

B

Barco
BCD Audio
Beijing United Victory Co Ltd
Bel Digital Audio
Belden Wire & Cable
Bexel
BFE Studio und Medien Systeme
Blackmagic Design
BLT
Blue Lucy Media
Bluebell Opticom

Bowens International
Boxer Systems
Bradley Engineering
Brainstorm Multimedia
BRIDGE Technologies
Broadcast Electronics
Broadcast Networks
Broadcast Pix
Broadcast Traffic Systems
Broadcom Ltd
Bryant Unlimited

C

Cache Media
Calrec Audio
Canford Audio
Canon
Canopus Co
Capella Systems
Cartoni
Cavena Image Products
Christie
Chyron Corporation
Cintel International
Clear-Com
Clyde Broadcast Products
Cobalt Digital
Cobham
Cogent Technologies
Colem Engineering
Crystal Vision

D

Dalet Digital Media Systems
Dan Technologies
Danmon Danmark
Danmon Norge
Danmon Svenska
Danmon Systems Group
Datavideo Techn Europe
DAVID Systems
dB Broadcast
Dega Broadcast Systems
DekTec Digital Video
Digital Garage
Digital Rapids

Dimetis
Dolby Laboratories
Doremi
DPA Microphones
Draka Communications
DTL Broadcast
DVS – a Rohde & Schwarz Company

E

Editshare
EMEA Gateway
Emotion Systems
EMS
Ensemble Designs
Envivio
Ericsson Television
Evertz Microsystems
Evertz UK
EVS Broadcast Equipment
Eyeheight

F

For-A (UK)
Forbidden Technologies
Front Porch Digital
Fujifilm (Fujinon)

G

GEA & Associates
Gearhouse Broadcast
Gekko Technology
Gencom Technology
Genelec
Gennum Corporation
Giga Communications
Gitzo
Glensound Electronics
Global Distribution
Globecast
Grass Valley
GSoft
Guntermann & Drunck

H

Hamlet Video International
Harman
Harmonic
Harris Corporation
HEGO
HHB Communications
Hi Tech Systems
HILTRON
Hitachi Kokusai Electric Europe
Hoseo Telecom

I

IBIS
IBM
IDC
IdeasUnlimited.tv
IDX Technology Europe
Ikegami Electronics Europe
Image Systems
IMT
Interra Systems
intoPIX
IPV

J

Jampro Antennas

K

KATA Bags
KINGS® by Winchester Electronics
KIT digital
Kramer Electronics

L

L2TEK
Lawo
Lemo
Litepanels
LSI Projects
Lund Halsey
LYNX Technik

M

Manfrotto
 Marquis Broadcast
 Masstech Group
 Matrox Video
 Media Asset Capital
 Media-Alliance
 MediaGeniX
 Mediatrade
 Mesclado
 Microwave Radio Communications
 Miller Camera Support Equipment
 Miniature Broadcast Cameras
 Miranda Technologies Inc
 Miranda Technologies Ltd
 MISTV
 Mode-AL
 Monarch Innovative
 MovieTech
 MSC
 MultiDyne

N

N2Power
 Nagravision – Kudelski Group
 NATIV
 Nautel
 NetApp
 Net Insight
 NETIA
 never.no
 Nevion
 NewsBoss
 Newtec Cy
 NewTek
 Nikon Europe
 NTP Technology
 NTT Electronics
 Nucomm

O

OASYS
 OConnor
 OKNO-TV UK
 OmniTek
 ORAD Hi-Tec Systems
 ORBAN
 Oxford Sound & Media

P

P+S Technik
 Panasonic
 Peak Communications
 Pebble Beach Systems
 Petrol
 PHABRIX
 Pharos
 phoenix7
 Photon Beard
 Pilat Media
 Pixel Power
 Pixelmetrix
 PlayBox Technology
 Plura Broadcast
 Polecam
 Portaprompt
 PROVYS
 PubliTronic

Q

Qbit
 Quadrus Technology
 Quantel

R

Radio Frequency Systems
 RadioScape
 Rascular Technology
 Red Bee Media
 RF Central
 RGB Networks
 Riedel Communications
 Rohde & Schwarz
 Roland Systems Group
 Root6
 Ross Video
 RT Software
 RTS Intercom Systems
 RTSS
 RTW

S

S3 Satcom
 Sachtler
 Sat-Comm Broadcast
 SatService
 SCISYS Deutschland
 Screen Subtitling Systems
 Sematron UK
 SENCORE
 SGL
 SGT
 Shotoku
 Signiant
 SIS LIVE
 Skyline Communications
 Snell
 Softel
 SoftNI Corporation
 Softron Media Services
 Solid State Logic
 Sonifex
 Sony
 Spectra Logic
 Starfish Technologies
 S.T.P
 Strategy & Technology
 STREAM Labs
 STRYME
 Studer Professional Audio
 Suitcase TV
 Sundance Digital
 SWIT Industry & Trading Co

T

TC Electronic
 T-VIPS
 TAMUZ Broadcast Monitors
 Tata Communications
 TEDIAL
 Tektronix
 Telecast Fiber Systems
 Telemetrics
 Telestream
 Telstra
 Thales Angenieux
 The Camera Store
 The VAR Network
 Thomson Video Networks

Three Media Associates
 Tiffen
 Timecode Systems
 Toshiba Corporation
 TMD
 Triada-TV
 Trilogy Communications
 TSL
 TSL Professional Products
 TV One

U

United Broadcast & Media Solutions
 Utah Scientific

V

Veale Associates
 ViaLite by PPM
 VidiGo
 Vidyocast
 Viewcast
 VILLAGE Island
 Vinten
 Vinten Radamec
 Visio Light
 Vislink
 Visual Unity
 Vitec Group
 Vizrt
 Volicon
 VSC Design
 VSN

W

Wings for Media
 Wire: Broadcast
 Wohler Technologies

X

XForm Systems
 Xilinx

Technology 2012

The industry is transitioning through dramatic technology changes with the IABM supporting members through a range of services.

With meetings held on a world-wide basis, industry standards and regulations play a key role assisting with interoperability, improved functionality, safety and the environment. Few members can afford the time or money to attend all relevant meetings, which is where the IABM plays an important part, attending, reporting and, where appropriate, representing member interests. More details are provided in a separate section of this report.

Technology is never far from any industry discussion and debate, even if the primary topic is business, strategy or management. We are a technology led industry which is undergoing a major transformation. Over the next few years operational environments will be more automated, increasingly dependent on IT technology and software rather than hardware driven.

The IABM takes every opportunity to encourage debate and discussion around what this means for the supplier community. Therefore technology always features at Member Days and at the IABM Annual Conference. In many cases it's not just about the engineers' view of technology but the strategic implications and how IABM members can adapt their development plans to take maximum advantage of the opportunities.

Featured topics in 2012 included: multiplatform systems, convergence of IT and broadcast, cloud developments, file-based systems, higher resolutions – High Definition and beyond, plus audio related subjects such as loudness.

BBC Lecture Series

The IABM collaboration with the BBC started with one lecture session in 2011 and continued in 2012 with several successful lecture and discussion evenings. At these events IABM and BBC invited speakers join an

audience made-up of BBC staff and IABM members. Topics

included: "Loudness", "Contribution Technology and the I.P Revolution", "Quality Control and File Based Systems". In order for all members around the world to benefit, highlight videos are posted on the IABM website.

The audio "Loudness" session proved particularly popular with changes in loudness measurement happening in Europe and North America. The EBU has been a prime mover, so we were fortunate to have one of Europe's foremost experts and chair of the EBU working group, Florian Camerer to explain the new EBU recommendations in addition to IABM invited speakers on the subject.

Contribution has been one of the most significant revolutions, moving from dedicated video circuits to Internet Protocol which affords greater flexibility and lower cost. Public networks can be used with the internet affording adequate performance for some applications. This is no more important than for news. Even the use of the mobile cellular networks have their place as was explained. Issues such as data rate and latency were explored. IABM members also described the use of IP for high quality contribution.

The introduction of file-based systems and the explosive growth in content leads to the requirement for automated methods of quality control. This was the topics of the third lecture in the series. Initiatives led by the DPP, EBU and AMWA are working towards more efficient handling and management of file-based systems and a further reduction in dependency on video tape.

So 2012, with standards activities and regulatory activities, special events, member meetings and presentations at major conferences, has been busy, with the IABM supporting members and contributing to the ongoing debate about future technology based developments.



Environmental Regulation

Back in 2009 we reported that the EU had proposed revisions to the RoHS and WEEE Directives and although at that stage these were simply proposals, it was reasonable to assume they would evolve as described. The revised RoHS Directive¹ was finally put into EU law on 21 July 2011 and should replace the

current version in all Member States own law-books on 2 January 2013. The new WEEE Directive² took a bit longer to negotiate but did get published as EU law on 24 July 2012, but does not replace Member State laws until 14 February 2014.

There are a number of important changes for manufacturers of electrical and electronic equipment,

such as IABM member companies, that apply immediately in 2013 if their products are already subject to the requirements of the RoHS Directive. The new obligation for “CE” marking of RoHS-compliant product may be more onerous than this first appears, even though most products will already have this requirement in compliance with other EU Directives, such as for the EMC or Low Voltage Directive. There are a number of harmonised standards against which RoHS compliance can be judged, such as EN 505813 “Technical Documentation for the evaluation of electrical and electronic products with respect to RoHS” which is the new CENELEC standard for RoHS CE requirements, but this is not due to be published and implemented as Member State national standards until 16 July 2013.

In the USA, on 22 August 2012, the US Securities & Exchange Commission (SEC) finally agreed rules for conflict minerals reporting, to implement the requirements of Section 1502 of the Dodd-Frank Wall Street Reform and Consumer Protection Act⁴. This has significant implications for manufacturers of

electrical and electronic equipment and although the first reporting requirements do not need to be filed until 31 May 2014, the data collection needed for that filing has to cover the whole calendar year of 2013. So, as with the new RoHS Directive, the impact is immediate as of the start of January 2013.

Even though both of these new legal obligations for 2013 are only enforceable in their home territories, they have an impact on the global supply chain and hence affect business organisations throughout the world. So for example, EU companies with US-based customers must expect to receive information requests to support compliance with conflict minerals reporting legislation and similarly EU companies will be asking their US-based suppliers for data to support their RoHS Directive Declaration of Conformity and CE marking of their products. Failing to prepare business systems to be able to deal with these requests in your organisation will risk losing out to competitors who have already made the necessary provisions in advance.

Technical Standards

The IABM participates in the meetings of a number of Standards bodies. This report looks at the progress made in key areas in 2012 and what can be expected in 2013.

EMC Standards

International

2012 has been a significant year in the development of EMC standards for our industry. CISPR (the part of the IEC that deals with high-frequency EMC) has published a new emission standard CISPR32 that is applicable to all audio and video equipment, broadcast receivers and computers.

The corresponding immunity standard, CISPR35, is making good progress and may be approved towards the end of 2013.

Europe

CISPR32 has been accepted and issued by the European standards body as EN 55032. They have recommended to the European Commission that, from March 2017, this new standard shall be used in place of EN 55103-1 to give ‘presumption of conformity’ with the requirements of the EMC Directive. The European emission and immunity standards (EN 55103-1 and EN 55103-2) that we have been using since the introduction of the EMC Directive are now in their twilight years.

SMPTE Standards Projects

The majority of SMPTE Standards are relevant to the work of the broadcast industry. In 2012,

SMPTE published 18 new Standards, Recommended Practices and Engineering Guidelines and another 18 document revisions / amendments. Throughout the year, there were typically 90 open standards projects under way (excluding the moving-picture-related groups). The following are attracting a lot of attention:

Interoperable Mastering Format – IMF

Important in this multiplatform consumption world, this document suite defines a single mastering format from which all variants can be derived. Documents on “Composition Play List” and “Essence Component” are at the final stage of approval. Five further IMF documents on Core Constraints, Application formats and Audio are currently being balloted.

Media Device Control over Internet Protocol

This project has achieved good progress in 2012, with “Media Device Control Framework” and “Wire Level Protocol” close to publication. A further two documents in the suite – “Discovery” and “Core Capability Interfaces” are being drafted and are expected to be approved in 2013.

UHDTV Ecosystem This new project will map out UHDTV workflows to help identify the interface standards needed.

Media Production System Production System Network Architecture

This new project will study and make

recommendations on aspects of IP network design to support Media Production.

AES Standards Projects

In 2012, the AES published 7 Standards documents, all with some relevance to the broadcast industry.

Important current projects include:

High-Performance Streaming Audio-Over-IP Interoperability

This project seeks to constrain a number of IP parameters to achieve interoperability. It has progressed well in 2012 and is likely to become a Standard in 2013.

Open Control Architecture

This new project started in October 2012. It is transport-agnostic, though TCP-IP is a prime target. It uses a device library and supports sub-classing for manufacturer-specific features.

There are also several Audio Metadata projects, an Audio Measurement project and a new project to standardize the popular MADi interface over twisted pair RJ45.

MPEG Projects

Of the very many MPEG projects, by far the most important 2012 development is High Efficiency Video Coding. It delivers bit rate savings as large as 50% or more, particularly for high resolution video, for the same visual quality compared with the current AVC standard. The standard is expected to be published in early 2013.

Education & Training

The Great Skills Debate

Recent IABM research has shown that many companies now cite the lack of trained staff as one of the main reasons that they cannot meet orders. So why does this 'resource shortage' exist?

Reports of a shortage of engineers in general have been repeated ad nauseum in recent years. Indeed, in late 2012, it has been suggested that in the UK alone there are some 90,000 engineers within 10 years off retirement and by the year 2020 there will need to be 87,000 people graduating with degree level engineering qualifications every year, a massive rise from the 46,000 we are seeing at present. In 2011 it was suggested that Germany faced a shortage of some 6,000 electrical and electronic engineers, whilst research commissioned by Reuters in 2012 suggested that in major economies such as Japan, the USA, Australia and Brazil around 49% of companies surveyed reported difficulty finding staff in such areas as Sales, Engineering, Finance and IT.

We are certainly not exempt from the 'ageing workforce' scenario and worryingly there now seems to be two other factors that may be exacerbating the situation. Firstly, the source of new engineers coming into the sector is starting to look a little fragile. Not only has there been a marked reduction in the number of Universities offering Broadcast Engineering Degrees, but we face fierce competition from other industries for the best graduates. This is particularly noticeable when we start looking to recruit graduates with more general electronic and software degrees.

Secondly, companies simply haven't been investing in training. Companies have quite comprehensive and robust training programmes in place to train customers in the use of their product, but when it comes to training their own staff it seems that they are a little less prepared.

So, how do we start preparing our staff to meet the challenges of the future? Firstly we need to attract the best graduates into our sector. To do this we simply have to forge closer links with relevant academic institutions. As the required skillset of the Broadcast Engineer changes we will need to start to look at institutions that we haven't really considered before.

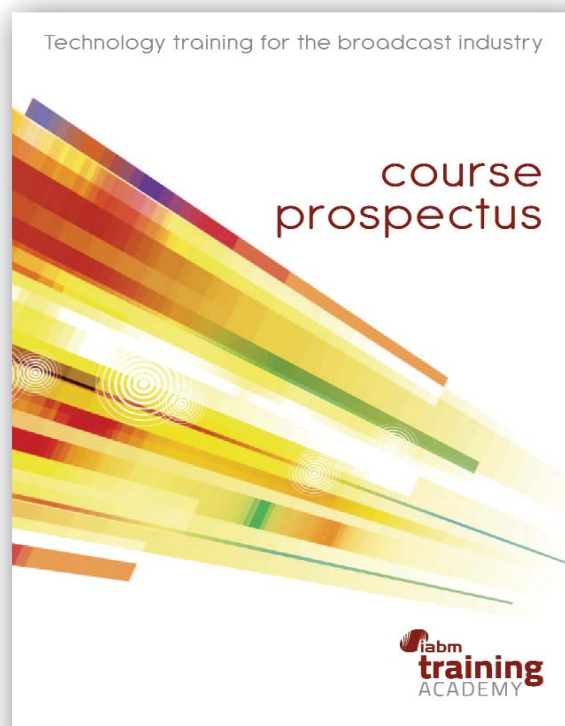
Perhaps we now need to start thinking about offering placements and internships where students on appropriate courses can spend up to a year working in

our organisations. These placements, whilst obviously attracting a financial cost to the company, not only showcase our industry, but can in effect be seen as 12 month 'job interviews'. We also have to 'sell the industry' and promote opportunities within the sector to a wider undergraduate audience. One simple way of doing this would be by attending career fairs and similar events.

There may even be a case for looking at an even younger element and engaging with schoolchildren to make them aware of the potential career opportunities within engineering in general and our industry specifically. Perhaps wherever possible we should be offering work experience placements, schemes exist throughout the world that make this a relatively simple task.

The investment in the recruitment and training of our staff isn't a cheap option. However, it's a lot less expensive than apathy and ignorance.

IABM Training – Courses designed for the Broadcast Technology Industry



The IABM holds a unique role within the broadcast sector and one that positions us to identify some of the key skills shortages within broadcast technology companies. We are building an array of courses

designed to address these shortages, and our extensive evaluation system confirms that our training courses do indeed make a difference to performance in the workplace. The response we are seeing indicates that companies across the industry are starting to wake up to the skills shortages facing them.

During 2012 we trained approximately 200 delegates and during 2013 we aim to reach 500 delegates across the world. In 2012 the IABM delivered three classroom courses in just one location (Reading, UK), and in 2013 it will deliver six classroom courses at three different locations in the UK, throughout Europe, and in the USA. The organisation is pursuing promising opportunities with training partners in other countries.

A new course prospectus contains the IABM's full — and growing — portfolio of courses that not only provide engineers and technologists with valuable technical skills training, but also offer administrative, managerial, and executive staff training on the role that technology plays in the broadcast industry.

The IABM training's strength is built on industry feedback, and from feedback received the IABM has designed three new courses: "Technology Product Finance," "Network Essentials for Broadcast Engineers," and "Compression Fundamentals and Applications." We also will offer an online training course through our dedicated Learning Management System.

Our unique position within the industry allows us to use course designers and instructors that are amongst the very best in their field, bringing years of experience to assist in all stages of the training cycle. We offer completely unbiased training that is constantly reviewed to ensure it keeps pace with the rapidly changing subject matter.

Highlights

- 7 courses
- 200 individuals trained
- Online training
- 1st non-english language delivery



Anyone wanting to discuss any aspect of IABM Training or Educational Liaison please contact Steve Warner on steve.warner@theiabm.org

Technology training from independent experts

Course topics include:

- Workflows
- Audio & Video Fundamentals
- Compression
- Networks
- Product Finance
- Understanding Your Industry

▶ CLASSROOM ▶ ONLINE ▶ IN-HOUSE

IABM Training Basepoint Business Centre, Oakfield Close, Tewkesbury, Gloucester, GL20 8SD United Kingdom.

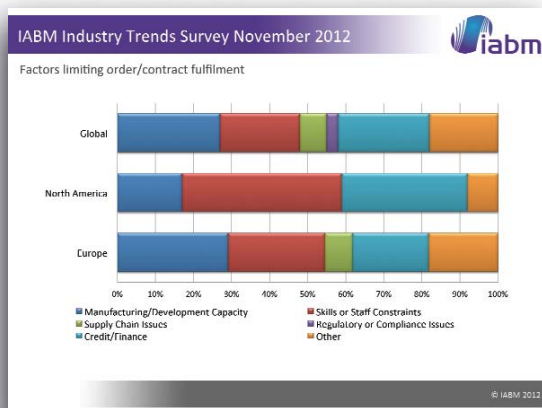
T: +44(0)1684 854460 F: +44(0)1684 854461

E: enquiries@iabmacademy.org F: www.iabmacademy.org



Realising Growth in Difficult Times

2012 has been a positive year for the broadcast and media technology sector. While global economic conditions have been very demanding our industry has managed to sustain modest growth despite the major economies hovering in and out of recession. These issues are tracked by a range of services which the IABM delivers free to members year round.



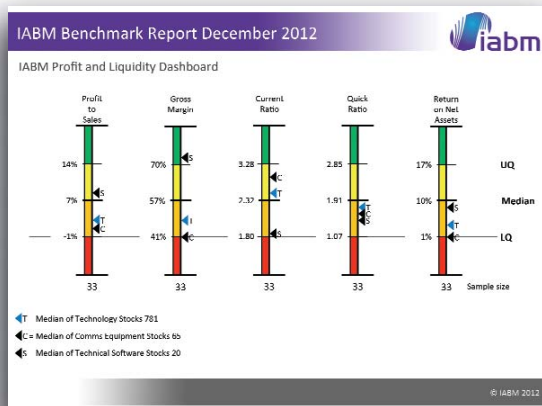
Our **Industry Trends Survey** takes the pulse of the senior executives of member companies. Twice a year we ask them to tell us how they are doing and what the immediate outlook is like. Together with our colleagues at Ernst and Young we aggregate and analyse the data and provide a timely snapshot of the situation on the ground. Only companies who provide data see the full analysis. As we move into 2013 the overall feeling is positive but quite muted. The expectation is that market conditions will continue generally as they are at present. The IABM Confidence Ratio for the year ahead still remains a positive figure at 3.6 but is down from 17 in Spring 2011. Credit and finance issues are constraining output to some extent, but the key issues are order and project deferral by the customer and staffing and skills issues impacting manufacturing and development capacity. **For further information see www.theiabm.org/industrytrends**



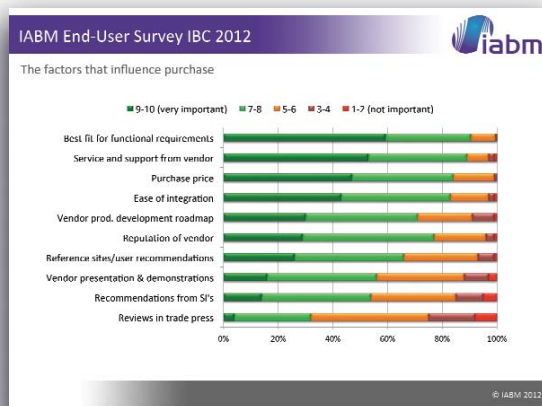
At least once every quarter, and to align with key events, we publish our **Industry Index**. This tracks the financial performance of the sector with regard to sales and profits based on published financials and disclosures under NDA agreements from members. Over the last year the industry has grown at just under 3% per annum, although we have seen profits falling steadily throughout the year and the profit-to-sales ratio has dipped just below 10% for the first time in over five years. Notwithstanding this more than two thirds of companies are still profitable. In difficult times the industry is holding its own.

There is more detailed information available to all members at www.theiabm.org/industryindex

During the recent IABM Annual Conference we unveiled a new service for members in this arena which is the **IABM Benchmark Report**. This delves deeper into company accounts and creates a series of benchmark parameters which enable member companies to compare their own performance with the sector as a whole and with related sectors. We will be expanding this activity further in 2013. The first edition analyses 33 companies and looks at issues like liquidity, inventory turn, receivable days and gross margin. The outcomes are tabulated as a dashboard to stimulate quick comparisons. Overall the sector is doing well but there is scope for improvement. The median gross margin is 57%, return on assets is 10%, with inventory turn at 91 days and receivables at 66 days. The dashboard will enable member companies to put in performance improvement programmes and quickly see the impact. **The first report is available for download at www.theiabm.org/benchmarkreport**



Twice a year we produce our comprehensive survey of the demand side of the industry. **The IABM End-User Survey** examines the customer side of the industry, in particular their views on the effects of the global recession and how it has affected their purchasing plans going forward. The report provides detailed analysis on changes to business models, procurement methods and technology strategy, as well as predictions for spending, investment and technology trends during the year ahead.



This survey is conducted prior to NAB and IBC each year and results are published shortly afterwards. The latest survey published after IBC 2012 showed that 48% of broadcasters said that 80% or more of their revenue came from traditional broadcast operations as opposed to new activities such as web, mobile, streaming, multi-platform content delivery, and in two to three years only 26% of broadcasters will have 80% or more of their revenue from traditional operations. The survey also clearly indicated the shifting focus away from technology for its own sake to life cost, after sales support and product compatibility and interoperability. **To get your member's copy of this extensive report go to www.theiabm.org/endusersurvey**

As we move into 2013 new services will be added to this repertoire which provides an extensive set of management information resources to help our member community develop their businesses and improve their performance. Member companies need to make sure all of this information is being accessed and is reaching the right people across their organisations.

“ We find that the twice yearly survey of economic indicators, the market situation and the information provided in that survey gives us a very comprehensive and global view of what's going on in the market. ”

STOP PRESS: A BRAND NEW IABM GLOBAL MARKET VALUATION AND STRATEGY REPORT AVAILABLE IN 2013
 The IABM's Global Market Valuation and Strategy report has become the default document for valuing the broadcast and media technology supply market. The fifth edition of this definitive report is being redesigned and reinvented for 2013 to keep pace with the changing face of our industry. Once again it will be the only report that values the market based on actual shipment data but it will be extended and re-segmented to reflect the changes that have taken place in the broadcast and media technology space since it was first published in 2006.
For more information on how you can reserve a copy of this report or become a partner in its design and implementation please contact the IABM on +44 (0) 1684 854460

IABM in 2013

Looking at the year ahead it is clear that global economic conditions will remain challenging, as they have in the main, for the last four years. Over that period the broadcast and media technology sector has fared better than many other industries and in 2013 we expect this trend to continue.

The demand for content will continue to grow and the need for it to be available anytime, anywhere and on multiple devices will also grow exponentially. The challenge has become the relentless trend towards wanting more for less.

Technology is a powerful enabler and has changed the rules. Hardware and software costs are tumbling and new players can now afford to participate in the industry.

With focus now firmly on efficiency, ROI, life cost of products and interoperability our customers are far more demanding than ever before and gone are the days of high tech for the sake of it, and high margins. The money is there but for many it's being spent in a different way.

So as our industry changes and welcomes in new players, then so must the IABM. A little over three years ago we embarked upon a strategy for the Association that has seen us become the predominant voice in the broadcast and media technology supply sector.

In 2013 we aim to build on this accelerating our development plan and ensuring we maintain our relevance to the market and our membership as it grows and changes.

In 2012 we invested in people in training, marketing, finance and admin, to strengthen the core team. At the same time we also concentrated on our presence in North America by opening our San Diego office and employing our Membership Coordinator. In 2013 we will be investing further in North America with the appointment of a manager to spearhead this initiative and a comprehensive range of activities. We hope to create a presence on both the East and West Coast in 2013.



We will of course continue to support our members at key events around the world providing business briefings and networking events and the dates and locations for these can be found on the wall chart and planner included with this Annual Review.

In 2012 we witnessed a substantial growth in the IABM Training division and we closed the year with seven different courses. In 2013 we will continue to expand this portfolio adding four more specialist broadcast engineering subjects to our prospectus.

We deliver these courses currently in Germany, Netherlands, UK and South Africa and in 2013 we plan to increase the delivery of these courses to further regions including North America and some of the APAC countries.

The IABM name has become synonymous with high quality specific industry business and market intelligence and in 2013 we plan to build on this. We will launch a brand new redesigned and remodeled edition of the IABM Global Market Valuation Report and will continue to develop new reports to enhance the library available as part of IABM membership.

To ensure our focus remains ever intense on this key resource for our members and the industry in general we will create a new Market Intelligence division in 2013 and to supplement and enhance our expertise in this area we will recruit an expert in this field to run the division.

As ever the IABM remains committed to its key tasks of representing and promoting the industry, of supporting and informing our members and bringing together under one voice the power and wisdom of many. In 2013 we will continue this journey.

IABM Business Standard

In today's business environment customers are increasingly entering into 'partnerships' with their suppliers. We have seen a shift to a focus on core competencies with outsourcing of non-core processes to specialist companies.

Our members are becoming increasingly involved within the business processes of their customers thus putting the emphasis on a trusted partnership rather than the traditional arms length supply contract. One way for a customer to choose from their shortlist of potential supply partners is the IABM Business Standard, which is an important criterion to be considered when end-users make their buying decision.



How can the IABM Business Standard help customers?

As our industry changes and the individual demands of customers increase, there has become a growing need for assurances surrounding the way in which suppliers conduct their business relationships. In a global industry, it is impossible for customers to be familiar with every potential supplier. Even when they are dealing with a well-known name, it is not always clear how the supplier in question operates and manages their customer relationships. The IABM Business Standard helps address the question, "How can you identify a good supplier?" It sets out criteria to ensure that suppliers who are members of the IABM, are reliable and responsible business partners.

How can the IABM Business Standard help suppliers?

For suppliers, the IABM Business Standard provides a differentiator to non-member businesses in the broadcast media supply community. For a supplier to be a member of IABM they must embrace the Business Standard as part of their business culture. By displaying the Business Standard logo, members are making a statement about their commitment and attitude to adopting good business practice.

IABM members are committed to the growth of our industry and they value a combined role in ensuring that growth. In addition, where members are considered to be in breach of the criteria set out in the standard, the IABM has developed a complaints procedure to aid resolution.

The IABM Business Standard is designed to foster best practice and high standards of business performance, just as ISO standards demonstrate quality and SMPTE/EBU standards demonstrate technical compliance. This logo really does mean business!

“The IABM Business Standard is an excellent initiative, fully subscribed by Axon. We believe the standard fully reflects how a well-run corporation should operate in the current business environment.”

IABM supported shows 2013	29 - 31 January 2013	CSTB, Moscow, Russia	www.cstb.ru
	29 - 31 January 2013	BES Expo, New Delhi, India	www.besindia.com
	26 - 28 February 2013	BVE, London	www.bvexpo.com
	12 - 14 March 2013	Cabsat , Dubai	www.cabsat.com
	21 - 23 March 2013	CCBN, Beijing, China	www.ccbn.tv
	8 - 11 April 2013	NAB Show, Las Vegas, NV	www.nabshow.com
	18 - 21 June 2013	BroadcastAsia, Singapore	www.broadcast-asia.com
	21 - 24 August 2013	BIRTV, Beijing, China	www.birtv.com
	13 - 17 September 2013	IBC, Amsterdam	www.ibc.org
	6 - 8 November 2013	NAT Expo, Moscow	www.natexpo.ru
	14 - 16 November 2013	InterBEE, Japan	www.inter-bee.com

The Team



Elaine Bukiej – *Membership Secretary*

Elaine is the primary point of contact for our members and for all enquiries concerning the IABM. She is responsible for maintaining our CRM system and organising our exhibition presence. Elaine also provides support to the Members Board and Director General.



Holly Cuellar – *Membership Coordinator*
– *North America*

If you are based in North America, Holly should be your first point of contact for any IABM queries. She is tasked with expanding our membership base in the region as well as assisting Joe Zaller and supporting our North American-based members.



Sam Hawkins – *Marketing Executive*

Sam works alongside Lisa in the IABM's marketing team, she is responsible for the IABM's marketing communications and coordinates activities for events. Please contact Sam if you have any ideas or suggestions for articles in our publications including the journal and the new IABM blog. She is also currently responsible for maintaining our website and social media presence while Sarah Lazenby is on maternity leave.



Lisa Ibbotson – *Marketing Manager*

Lisa is responsible for all IABM marketing activities including the promotion of our Training. In addition she is responsible for organising our events, our CRM, and publications. Lisa is your key contact for any enquiries about sponsorship, or media information and would be delighted to hear from anyone that has feedback, both positive and negative on how we can enhance any of the IABM's activities.



John Ive – *Director of Business Development & Technology*

As well as overseeing the activities of our Technical Task Group and Advisory Board, John also provides leadership for approved projects related to industry strategy and needing industry specific knowledge and has shared responsibility for a number of key business development activities.



Sarah Lazenby – *Digital Marketing Executive*

Sarah is responsible for the IABM's online presence and digital communications. She has a background in web marketing and together with the rest of the team, is working hard to ensure that the IABM is your key resource for industry knowledge



Lucinda Meek –

Financial Controller & Membership Benefits Manager

Lucinda is responsible for our finance, HR, corporate and office management and is the primary contact for subscription queries. In addition, Lucinda is responsible for the on-going development of our membership benefits package, ensuring that the IABM continues to provide relevant business services to all members, and is Chair of our ETG.



Zoe Roberts – *Accounts Assistant*

Zoe is a member of the finance team and provides day to day bookkeeping and administrative support for the association. She works for us on a part-time basis and is the first point of contact for any invoice or payment queries.



Steve Warner – *Training Manager*

Steve is tasked with developing and managing the IABM Training. He has many years experience including instructional design and training delivery as well as staff development and training management in various organisations. His knowledge, skills and experience will be essential to support the growth of our training function and to ensure our offerings meet the requirements of the industry.



Peter White – *Director General*

As Director General, Peter's responsibilities include the development and implementation of the association's strategies; representing our members at executive level to organisations around the world and overseeing the smooth running of the Secretariat. Together with the whole team, Peter is focussed on establishing the IABM as the authoritative voice of the industry.



Joe Zaller – *North American Market Development Officer*

Joe, of Devoncroft Partners, has been appointed to help promote the Association within the North American region. Many of you will already know Joe as he has worked in the industry at senior level for many years. He is also familiar with the IABM having previously been a members' board participant.



*“ We are very pleased
that the IABM is a global
association. This actually
gives us a lot of input
into our business. ”*

An IABM member



Democratic • Accountable • Visible

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