



ANNUAL REVIEW



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Welcome to the IABM Annual Review 2014



Peter White
CEO, IABM

The broadcast and media technology sector continues to grow at a healthy rate and this is made all the more interesting as we are certainly in the throes of a remarkable and exciting transition. Around half of our overall market is now represented by services and the migration away from bespoke broadcast hardware to standard IT platforms supporting virtual broadcast hardware is underway.

Our long term members have, in many cases, had to change their business models and product development roadmap markedly, and in the meanwhile we welcome some new members on board who have a less traditional history and have entered the market purely focused on new forms of services for content delivery.

Irrespective of our members' individual history or path to the broadcast and media technology market, we believe the IABM can make a difference to their businesses. We provide a level of support that helps them to gain competitive advantage either individually or sometimes as a collective through collaborative projects.

We remain the only international trade association representing the broadcast and media technology supply sector and our business is to help your business to achieve greater success.

It is often quoted that "knowledge is power" and certainly an informed business is more likely to make the right decisions than one that is operating in ignorance, or worse still with poor information. The the IABM suite of business intelligence, provided free of charge to our full members, certainly can act as a light to any strategic path.

This knowledge can be further enhanced by the acquisition of the only valuation

report truly worthy of the name. The authoritative Global Market Valuation and Strategy Report produced annually in partnership with Devoncroft through our joint venture IABM DC. The report has been produced since 2006 when it revolutionized market thinking and since then has grown to be the most comprehensive and accurate report of its kind available.

Add to this a host of other services available to you as members. Discounts on show booths, exclusive member lounges at shows, meeting room availability, pavilions at shows, discounts off other approved market intelligence, awards, networking opportunities, meetings throughout the world, interpreter services, market entry reports, the opportunity to speak to and work with your peer group and act as thought leader. The opportunities we provide are legion.

We also have a comprehensive range of training courses on broadcast technology subjects and soft skills for you to keep your staff at the leading edge once again

through the imparting of knowledge. Some members have an allocation of free courses but all of our courses are heavily discounted to members.

As I said here last year "speaking frankly not being a member of the IABM puts any supplier at a distinct disadvantage. It is our job to represent and promote our industry and we are proud to have been doing so for the best part of 40 years."

We will achieve this milestone in 2016 but every year for the IABM is an important year and one of growth in our products, services and geographic coverage.

There is far more detail on what I may have lightly touched on here in the pages of this Annual Review. You will learn what we have been up to in 2014 and what we will be doing in 2015 as well, so please enjoy reading this review as much as we enjoyed putting it together.

Thank you for your support this last year from all the IABM team and we look forward to working with you again in 2015 and beyond.

DISCOUNTS

TECHNOLOGY

GLOBAL MARKET INTELLIGENCE

TRAINING

RESOURCES

NETWORKING

iabm

Give your business a competitive advantage

Join the IABM and you'll be part of the only trade association that represents the broadcast and media technology supply industry worldwide.

Whether it's through the provision of knowledge and information, support at exhibitions, technology briefings, business conferences and networking events or simply a vast array of member discounts, the IABM is always there on hand across the globe to assist your enterprise.

Join us today! www.theiabm.org

2014 Review

As we reach the end of 2014 we can reflect on a better year for our industry in terms of financial performance, with sales growth and profit growth both stronger than in the previous post recession years. Hopefully this augurs well for a positive 2015.

There is no doubt however that there are significant challenges ahead. This year has seen our customers coming to terms with a completely new business model. As content is distributed now across multiple platforms so have the systems required to facilitate this changed.

The use of traditional IT products is now widespread and bespoke broadcast technology hardware is being replaced by software and virtual hardware in a number of places along the broadcast chain.

There are of course a handful of leading edge broadcasters who are on top of this transition but there are many more who are wrestling with the turmoil such a paradigm shift brings. It is quite a cultural change to move from a broadcast technology hardware led environment to a software defined environment and the vast majority of end-users are a long way from making a successful transition.

This is mirrored by the vendors, our members, who are facing similar challenges not least with their product development strategy. Understanding the needs of the customer is of course a pre-requisite but not always so easy when they are in such a state of flux. The clear

thinkers, the innovators, the agile and those that can understand the needs of the end-user and quickly find the solution will be the ones that win through in the longer term. The need for greater vendor collaboration is also evident to bring about the best solution for our customers.

Our 10th Annual International Business Conference was held on the 4th and 5th of December at the Radisson Blu Edwardian Hotel, Heathrow, London. The program this year was nothing short of sensational. We delivered a wealth of new research, informed the audience and set the platform for debate and discussion with industry leaders and experts from outside our industry. There were thought provoking keynotes, interactive panel sessions and direct feedback from the "voice of the customer". There's more on the conference on page 10 of this Annual Review.

It is fair to say that 2014 has seen a lot of new activity from the IABM as well. Your membership enabled us to accomplish so much this year:

- We expanded our operations in both North America and APAC with new key appointments made.

- Through our new Joint Venture business IABM DC (with Devoncroft) we produced the most comprehensive and informative Global Market Valuation and Strategy Report ever that provides detailed valuation analysis of the market by product and region based on actual shipping data. It is recognized as the authoritative report of its kind in our market.

- We continued to develop the Training Academy course portfolio which now has 17 courses, both technical and soft skills, some of which can prepare delegates for the IABM Certified Broadcast and Media Technologist Certificate.

- We launched a brand new website and CRM system which will allow us to communicate with you in a way that you can configure, so you get to choose what you want to hear about.

- We introduced new benefits for members such as our Members' Lounge at IBC which was very well received and we plan to provide these at as many shows as we can.

- We have revamped the IABM Product Locator and also have launched a new dealer database for members.

Perhaps the most visible thing we have done in 2014 is the move to a new membership structure. This was more evolution than revolution but we now have four categories of member; Bronze, Silver,

Gold and Platinum with Silver being split by size between Silver and Silver100+.

When we did this we also provided extra benefits to go along with the change, so dependent upon category in 2015 you will benefit from items such as complimentary training course places, places at conferences and events, advertising on our website, extra brand names, webinars and global branding to cite but a few.

Two other key changes: Firstly from 2015 all membership will be global, so no matter where your companies and employees are based they will have access to the IABM. Secondly the Bronze category is a new unique category designed for companies that do not provide products or services to the end-user but exist in the ecosystem, providing support and services to those that in turn supply the end-user.

We have exciting plans for 2015, with a whole host of new initiatives, meetings, conferences and events. We are in a dynamic and fast changing industry and it is our mission to help our industry develop and prosper and our members to gain competitive advantage through our support and services.

So as we enter 2015 we are up for the challenge at the IABM and look forward to supporting our members in their quest to attain even higher levels of performance. Our members are why we exist and it is you who help us make a difference.

New Membership Structure

Perhaps one of the most visible things we have done in 2014 is the move to a new membership structure. This was more evolution than revolution but we now have four categories of member; Bronze, Silver, Gold and Platinum with Silver being split by size between Silver and Silver100+.

Whichever membership category your company belongs to, you will have access the IABM's resources globally for all your employees wherever they are based.

Platinum Membership

Our IABM Platinum members are making a statement, clearly identifying themselves as a 'thought leader' and 'trailblazer' in the industry.

The additional benefits provided to an IABM Platinum member are all geared to facilitating this objective. Extra engagement opportunities through business conferences, breakfast briefings and business leaders' summit, together with unlimited brands / subsidiary additions are all part of this exclusive package.



Gold Membership

Being an IABM Gold member signifies your deep level of engagement with the industry and of course your business partner the IABM.

Extra benefits are included for an IABM Gold member over and above the impressive list available to Silver members. Gold members are usually, but not exclusively, a larger organization possibly with a number of brands or subsidiaries that you wish to be included in your membership.



Silver Membership

There are two tiers to this level of membership. IABM Silver members (companies with 0-99 employees) can take advantage of the plethora of business support information, services and discounts that provide direct financial return. The more you engage with the IABM, the more you will benefit.

Benefits for Silver 100+ members (companies with over 100 employees) reflect those of the Silver category but some entitlement levels have been increased to support higher usage and this is also reflected in the cost.



Bronze Membership

IABM Bronze is our new, unique membership category. Specifically designed for companies that do not provide products or services directly to the end-user but exist in the ecosystem, providing support and services to those that in turn supply the end-user.

An IABM Bronze member is recognized for the contribution they bring to the industry.



Member Benefits

Discounts (conditions apply – full discount terms available on www.theiabm.org)

	Platinum	Gold	Silver100+	Silver	Bronze
5% – 10% exhibition stand space – IBC, NAB, BCA, Cabsat, InterBEE, BI, NATEXpo, CSTB, BIRTV, CCBN, BVE, CCW	✓	✓	✓	✓	✗
10% exhibition space IBC MENA	✓	✓	✓	✓	✗
Up to 15% IABM pavilion space IBC MENA	✓	✓	✓	✓	✗
20% publicity opportunities – BCA, Cabsat, BIRTV, CCBN, BI, CSTB	✓	✓	✓	✓	✗
20% IABM publications and events	✓	✓	✓	✓	✓
20% IABM training courses	✓	✓	✓	✓	✓
15% discount on Big Broadcast Survey report from Devoncroft	✓	✓	✓	✓	✓
40% on other Devoncroft reports	✓	✓	✓	✓	✓
30% saving on entry to IABM Awards Programs	✓	✓	✓	✓	✗
10% advertising with IABM	✓	✓	✓	✓	✓

Technology

	Platinum	Gold	Silver100+	Silver	Bronze
Monthly technology report	✓	✓	✓	✓	✗
Technology events	✓	✓	✓	✓	✓
Webinars	✓	✓	✓	✓	✓
Regular updates on legislation – EMC, AES, REACH, RoHS, WEEE, IEC, ISO	✓	✓	✓	✓	✗
Advisory service – informal email helpline	✓	✓	✓	✓	✗
Complimentary publishing of white papers on IABM website	4	2	1	1	✗
Technical Advisory Board	✓	✓	✓	✓	✗

Market Intelligence

	Platinum	Gold	Silver100+	Silver	Bronze
Industry Index	✓	✓	✓	✓	●
Industry Trends Survey see note 1	✓	✓	✓	✓	✗
End-User Survey	✓	✓	✓	✓	●
Benchmark Report	✓	✓	✓	✓	●
Market Entry Studies	✓	✓	✓	✓	✗
IABM Event presentation slides	✓	✓	✓	✓	✓

Key: ✓ included ✗ not included ● chargeable 🧑‍🤝‍🧑 chargeable at member rate

Training

	Platinum	Gold	Silver100+	Silver	Bronze
Complimentary classroom course places see note 2	5	2	1	1	🧑‍🤝‍🧑
Complimentary online course seats	10	5	2	2	🧑‍🤝‍🧑

Resources

	Platinum	Gold	Silver100+	Silver	Bronze
Complimentary postings on IABM Job Shop	✓	✓	✓	✓	🧑‍🤝‍🧑
E news	✓	✓	✓	✓	✓
Event news	✓	✓	✓	✓	✓
Product locator	✓	✓	✓	✓	✗
Marketing and technology webinars	✓	✓	✓	✓	✓
Daily news feed relevant to your region/interests	✓	✓	✓	✓	✓
International industry events calendar	✓	✓	✓	✓	✓
Quarterly journal	✓	✓	✓	✓	✓
Support at exhibitions (translator at some shows, feedback/liaison with exhibition organizers)	✓	✓	✓	✓	✗
Meeting rooms/areas at exhibitions	✓	✓	✓	✓	✓
Members lounge – at shows and exhibitions (seating, catering, free WiFi)	✓	✓	✓	✓	✓
Annual review	✓	✓	✓	✓	✓
Distributor/dealer directory	✓	✓	✓	✓	✗
Trade show review reports	✓	✓	✓	✓	✗
Exhibitor Task Group	✓	✓	✓	✓	by invitation
Business Standard – including logo	✓	✓	✓	✓	✗
Access to business document templates	✓	✓	✓	✓	✗
Bronze logo	✗	✗	✗	✗	✓
Silver logo	✗	✗	✓	✓	✗
Gold logo	✗	✓	✗	✗	✗
Platinum logo	✓	✗	✗	✗	✗

Networking

	Platinum	Gold	Silver100+	Silver	Bronze
Complimentary places at all IABM Annual International Business Conferences – wherever located	3	1	🧑‍🤝‍🧑	🧑‍🤝‍🧑	🧑‍🤝‍🧑
Complimentary dinner table for 10 at all IABM Annual International Business Conferences – wherever located	1	🧑‍🤝‍🧑	🧑‍🤝‍🧑	🧑‍🤝‍🧑	🧑‍🤝‍🧑
Breakfast meetings – at shows and exhibitions	✓	✓	✓	✓	✓
Breakfast conference sessions – at shows and exhibitions	✓	✓	✓	✓	✓
NAB party (ticket allocation)	30	20	8	4	2
Exhibitor reception – at shows and exhibitions	✓	✓	✓	✓	✓
Regional C level meetings on specific issues & topics (e.g product management, sales channel development, marketing communications etc.)	3	2	1	1	🧑‍🤝‍🧑

Other

	Platinum	Gold	Silver100+	Silver	Bronze
Pavilion space – at various exhibitions (see website for conditions)	✓	✓	✓	✓	✗
Enhanced listing on product locator	✓	✓	✓	✓	✗
Opportunity to sit on IABM Board	✓	✓	✓	✓	✗
Entitled to vote at AGM	✓	✓	✓	✓	✗
Briefing of IABM CEO to member on industry and representational issues	✓	✗	✗	✗	✗
Prominent branding on website year round	✓	✓	✗	✗	✗
Attendance and presentation by IABM CEO on industry issues at investor, channel and team meetings	✓	✗	✗	✗	✗
Presentation of thought leadership webinar	✓	✗	✗	✗	✗
Logo on all IABM events worldwide	✓	✗	✗	✗	✗
Complimentary number of subsidiaries/brands included see note 3	All	All	✗	✗	✗
Business leaders summit	✓	✓	✗	✗	✗
Exclusive IABM sponsorship opportunities	✓	✓	✓	✓	✓
An article in the IABM Journal (also published on website and blogs)	Annually	✗	✗	✗	✗

Notes: 1. The IABM Industry Trends Survey is available exclusively to respondents to the survey 2. Courses provided in nearest territory or virtually 3. Members can add further brands/subsidiaries to their membership for an additional charge of £275 per brand/subsidiary 4. Companies with more than 99 employees cannot be less than a Silver100+ member. Any company eligible at Silver can also be Gold or Platinum if they wish to obtain the extra benefits and a deeper level of engagement. Information correct at time of print, December 2014.

Exhibitions

The IABM works closely with the key event organizers to ensure the shows remain relevant, as well as minimizing the costs associated with exhibiting to maximize the returns. The IABM does this through a program of support for industry events, as well as regular surveys to gather members' views. The IABM works with key event organizers on different levels to represent the interests of its members. There are two levels of support: Sponsored and Supported.

IABM Sponsored Events

The IABM has a strategic partnership with the event organizers and recognizes the event as an industry leading event in its region or on a global basis. These events are recommended to IABM members as a leading event and the IABM has a public presence at the show to support members.

The current IABM Sponsored Events are:

- IBC, Amsterdam
- IBC Content Everywhere
- NAB Show, Las Vegas



IABM Supported Events

The IABM undertakes regular audits of these shows and recommends them to members as credible events. The current IABM Supported Events are:

- BES Expo, New Delhi
- BIRTV, Beijing
- BroadcastAsia, Singapore
- Broadcast India, Mumbai
- Broadcast Video Expo, London
- Cabsat, Dubai
- CCBN, Beijing
- CCW (Content & Communications World), New York
- CSTB, Moscow
- Inter BEE, Tokyo
- NATexpo, Moscow



Exhibition Task Group

Association policy for event sponsorship and support is developed by the Exhibitions Task Group. Any member company may nominate a representative to join the convening group which meets several times a year and receives reports and recommendations from the IABM team and from other members. The IABM attends, audits and reviews shows around the world and is the only global body which represents the "exhibitor" at industry events.

Member benefits at sponsored and supported shows.*

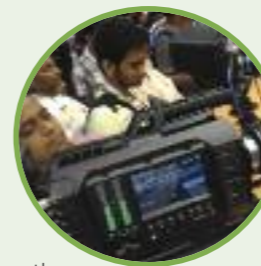
- Discounts
- IABM Booth with meeting facilities
- Member Lounge
- Pre-Show Reception
- Executive Breakfasts

*Benefits vary according to show.

Exhibitions Review 2014

Broadcast India

Broadcast India (BI) was held in Mumbai for the 24th year on 15-17 October 2014. Kavita and Ramesh



Meer have been running the show since the first event in 1991 (under "Saicom Trade Fairs & Exhibitions"). The event is a mixture of conference (two days) and exhibitors booths that aims to attract as many international players as they can to the Indian market, as well as allowing local resellers and system integrators (SIs) to show their goods. With its location at the heart of India's Cinema industry, "Bollywood", it attracts a good proportion of production orientated (including electronic film) and associated equipment suppliers. However, the traditional broadcast manufacturers and suppliers were also very well represented.

The interesting thing that hit you when visiting the show is the largest booth; Blackmagic Design. The India broadcast market has been growing with the increase of home grown channels (partially news and entertainment) and rise in sports coverage (not just cricket). Anybody who has witnessed the changes in the India broadcast market from a supplier side, will know that this is a price sensitive market and the "upstarts" Blackmagic Design

seem to address this perfectly. With their low cost (transparently listed pricing in India Rupees, by each product) and addressing 4K equipment, their booth was always very busy. However, price sensitivity does not mean that the end customer accepts poor quality products.

Indian manufactures Wasp3D and Real Image were present, while Monarch stayed shy of the show. Of course the major local SIs/resellers such as AGIV, Cineom, SRSR, VTI, Ideal Systems etc. were very much present. Many manufacturers big and small were able to demonstrate their solutions under the reseller umbrella. It is also clear that there were a reduced number of SIs present, showing pricing pressures in this segment.

The show space was fully booked with 500 plus exhibitors. The Broadcast India event has not been able to attract many of the newer multi-screen or OTT solution providers. The software solutions providers were limited to Wasp3D, Adobe and a few others on reseller booths, in which to show their production oriented software.

To summarize, the Broadcast India Show 2014 was a well-attended event with quality customers and good feedback from IABM member companies. Nearly all spoken to said that they would exhibit next year in the 25th Broadcast India Show (2015).

CSTB 2014

This was the 16th CSTB exhibition and forum held between 28-30 January 2014 in Moscow, Russia at Crocus Exhibition centre (pavilion 1). The show is organized by Midexpo Exhibition Company and the Cable TV Association of Russia.



The exhibition is largely dedicated to distribution and delivery – digital cable, satellite and free-to-air TV, IPTV, OTT, HDTV, TV content, multiservice networks and satellite communications. What makes it interesting is a whole hall dedicated to networks such as Nickelodeon and Fox.

CSTB'2013 introduced a 'Smart TV & Multiscreen Zone' and CSTB 2014 has built upon the success of this by expanding both the size and scope and developing CONNECTED TV & MOBILE MULTIMEDIA exposition, providing the opportunity for all exhibitors to display not only current technology and solutions but to also showcase future innovations.

The exhibition occupied three halls of pavilion 1. The standard of the show is good with smart stands and furniture, good refreshment and toilet facilities and free Wi-Fi in the foyers.

The Crocus is a modern and purpose built facility with good car parking and a metro that comes to the door. There is a well-attended and comprehensive conference that runs during the show. The 5th National Awards in multi-channel digital TV were also held at CSTB.

InfoComm

As vendors look to expand their target vertical markets, shows such as InfoComm are now home to many broadcast and media technology companies. We live in a world of audio and video everywhere – airports, shopping malls, casinos, etc. Content, whether it's general information, news, or entertainment can be found on every screen and in nearly every location the population inhabits.

InfoComm 2014 by the numbers:

- A record number of attendees move InfoComm 2014 forward
- 37,048 attendees from 114 countries
- A 5.5 per cent increase in attendance compared with InfoComm 2013
- There were 947 exhibitors participating at InfoComm this year
- Exhibitors occupied more than 490,000 net square feet of exhibit and special events space

IABM Exhibitions Review continued

CCW

2014 was the first year NAB took over the annual east coast event CCW + SATCON with record numbers. According to the announcement, CCW+SATCON showcased a record 324 exhibiting companies, up from nearly 260 companies last year. The exhibit floor grew 13 per cent, expanding from 46,000 net square feet in 2013 to over 52,000 net square feet this year.

The floor on day one of CCW was very active whereas the SATCON side was less busy but vendors were still quite happy with the traffic. Holding CCW+SATCON in New York provides the unique opportunity to see multiple players from the likes of ESPN, FOX, NBC, CBS and MTV walking the show floor in groups. It's a nice change for attendees to spend quality time seeing vendors and products without the 'hype' that often comes with the major product launches during the Spring NAB show in Las Vegas.



SET Expo

This is the first year the show has been run solely by SET – the Brazilian Society of Television Engineering. In previous years, the exhibition has been held in conjunction with event organizers CERTAME and called SET Broadcast and Cable. Both organizations held competing events this year but SET was the one supported by the hugely influential TV Globo and seems to be the one that the industry is supporting.

The exhibition is comparable in size to BVE and is very much a national show. However it is the major event for television, radio and telecommunications engineering in Latin America and is the South American exhibition of choice for international companies mainly because of the size and growth of the Brazilian broadcast market. The event is very professional looking with many large stands. The show traffic was high and consistent over the three days. There is a high percentage of distributor stands but the products were promoted very well with many employees of those businesses being on the stand to talk about their products. The quality of the visitors was high, with decision makers able to make choices as you presented to them. The broadcasters are relatively few and they have large and self sufficient engineering departments.

English is not widely spoken so a few Portuguese phrases are useful, although to do business there you will need to use Portuguese speakers.

SMPTE

This is a four day event held annually. The conference takes place in Hollywood and brings together approximately 500 delegates and 100 exhibitors.

As the title suggests this is a technical conference described as an "event for motion imaging and media technology, production, operations and the allied arts and sciences". It spans three days of

"highly technical sessions" in addition to the exhibition and networking. The presentations vary in both quality and approach. Some are a little too commercial and although interesting, relate to a description of a specific proprietary solution. Alternatively there are presentations which describe SMPTE's work in progress usually given in a neutral or tutorial way, these are very good.

The opening Keynote was presented by Chris Fetner, Director of Global Content Partners Operations, Netflix. The fact he was there talking about their operations and their use of SMPTE standards is a sign of the times. Clearly internet delivery has joined cable, satellite and terrestrial as one of the top deliverers of content to consumers.

Many topics that come under the umbrella of IT technology centre on networked based systems. Several sessions highlighted the effort that goes into developing network systems that can replace the full gamut of broadcast and media operations.

Audio was not forgotten with object-based audio on the agenda. This will provide a more immersive experience and is said to be growing rapidly as cinemas invest in the capability to decode the discreet cinemas. The first steps are being made to introduce it to consumer products as well.

SMPTE takes an interesting approach to the exhibition. The booths are all similar in size and most have displays relevant to the conference sessions. It does create a more

informal low key approach devoid of too much marketing hype. The 100 or so exhibit stands filled the "Ray Dolby Ballroom", with delegates given ample time during the coffee and lunch breaks to wander around. Comments were mixed from the exhibitors, the visitors are mainly technical people with not too many looking to purchase. If this is understood and expectations are set accordingly then the exhibition can be viewed as a success.

IBC

We kicked off this year's IBC Show with a packed conference session chaired by IABM's John Ive, Director of Business Development and Technology, the main presentation delivered by Peter White, Chief Executive, IABM, the theme of the session was the future of broadcast technology.

A lively panel debate, featuring a host of industry-leading presidents and CEOs, followed the main presentation. The discussion delved into the future state of the technology supply industry, the need for future-proofing and the move towards software-based business models. Participants included Charlie Vogt, President, Imagine Communications & Gates Air; Marco Lopez, President, Grass Valley; Ray Cross, Executive Chairman and CEO, Quantel; and Dan Castles, President/CEO, Telestream.



Industry Recognition

Game Changer Awards



We announced the winners of its prestigious Game Changer Awards during a cocktail reception at the NAB Show in Las Vegas in April 2014.

Atomos with Shogun; Axon with its Neuron AV Bridging; Bridge Technology with VB288 Objective QoE Content Extractor; Grass Valley with GV Stratus; and SDN² with GRID took top honours at the event.



IBC – IABM Design & Innovation Awards

Our Awards for Design & Innovation reception took place on the Saturday evening at IBC. The newly structured awards celebrate those solutions that offer significant benefits or new opportunities to the broadcast and media industry and recognize achievements across nine different segments.



Winners: Trimaran – GEORACING, Quantel – Genetic Engineering 2, NTT Electronics – Robust IP Transmission with NA8000, Sennheiser – Esfera, Ardis Technologies – DDP Superior Shared Storage Solution, VidiGo – Studio Automation, Elemental Technologies – Elemental Delta Video Delivery Platform, Cube-Tec – MXF Legalizer, Cambridge Imaging Systems – IMAGEN



Awards at the IABM Annual International Business Conference

We presented our yearly awards during the gala dinner at our Annual International Business Conference.



Business Woman of the Year:
Naomi Climer



Young Person of The Year Award:
Adam Plowden



John Ross OC, founder of Ross Video and broadcast manufacturing industry key authority was given honorary IABM membership.



Excellence In Sustainability Award:
Elemental Technologies



Peter Wayne Award for
Design & Innovation: Axon



The IABM Annual International Business Conference 2014

The IABM Annual International Business Conference (the 10th anniversary year) delivered on the promise and consolidated its position as one of the highlights of the industry calendar.

This year the program contained more keynote presentations from senior industry executives which provided delegates with a wealth of additional information.

The IABM conference is unique in that it is tailored to the needs of the technology supply community, at the same time appealing to a broad spectrum of delegates. It's a gathering delivering presentations, panels and debates but also an opportunity for informal networking outside of the main conference agenda. The conference almost certainly contributes to strategic thinking as executives share ideas and consider the future direction of their respective companies.

Once again it was good to see that many parts of the world were represented both on the stage and audience in the

A strong program of speakers and choosing a location close to a major International airport clearly helps grow International participation.

There was no overarching conference theme, but there were themes for each of the four conference sessions:

- Business overview – where are we now?
- Corporate intelligence – smarter thinking
- The influence of technology
- Critical success factors

Business Overview – where are we now?

The tone of the presentations and of the audience was more buoyant than previous years. This in part perhaps reflected by the improved sales performance data provided by Peter White, the IABM CEO. He reported year-on-year sales growth to be 7.7%. Although sales are improving IABM research demonstrated confidence has not fully recovered and has in fact declined slightly, together with a slight decline in profit growth.

The presentation from Joe Zaller (President, Devoncroft Partners) and Josh Stinehour (Principal Analyst, Devoncroft Partners) provided more detail about the most significant trends and projects but with a cautionary note that what is most talked about is not necessarily what broadcast and media budgets are spent on in the short term. Joe Zaller demonstrated this with the example of multiplatform delivery, a hot topic but far down on broadcaster shopping lists.

The following panel session debated how profound the industry changes are, with new business models centre stage. Agility and ability to react are key drivers for the new era of IT based solutions. The panel did however note that different regions of the world present different requirements. David Ross, President and CEO of Ross Video pointed out that despite uncertainty about the future, the IABM data continues to show total industry value to be growing, which is a positive sign.

Closing off the first session was Julia Lamaison from GfK. She delivered the message that conventional broadcasting remains healthy with new content consumption options growing fast and for the most part additive. All the different services can co-exist however conventional channels can learn from the new content providers and their innovation in navigation.

Corporate Intelligence – smarter thinking

Opening the second session Mark Christie of Piksel very well explained the dynamic behind internet services and how both technology suppliers and end-users should evaluate the options.

Steve Reynolds, CTO of Imagine Communications was the first to introduce what was to be a major conference theme in his presentation "The impact of IP on our industry". His presentation highlighted the reality that IP has already been a game changer and will continue to evolve.

Prior to the closing panel session Jason Power presented his research for the IABM, a result of interviews with key industry figures. The accumulated opinions provided a very helpful picture of the opportunities ahead and the adaptations required to benefit from them. His key messages included a theme that would resonate through other sessions, the need for technology suppliers to better understand client businesses and to become more of a solution partner.

The end-user panel proved to be another highlight and demonstrated the diversity of opinion among customers. A spirited debate ensued, which actively included the audience. One of the key messages was the high level of risk aversion towards new technology by some but not all broadcasters. This is a major challenge as the industry moves fast-forward with a new generation of IT centric solutions.



The Influence of Technology

Prior to this session John Amaechi OBE gave a compelling account of his own career journey culminating in his current activities as an organizational consultant and high-performance executive coach. It was certainly one of the highlights of the conference and inspirational for many. He translated his experience from childhood, through being an NBA basketball player and now a highly successful business owner and industry figure. The most important theme John hoped to illustrate through his personal story of struggle and triumph, was that "...despite what we are often told, the most unlikely of people, in the most improbable of circumstances can become extraordinary."

Following John Amaechi's presentation Peter White interviewed Niall Duffy who had just returned from chairing an IABM Educational Foundation initiative and a workshop hosted by the EBU to address the skills agenda. Niall explained how the meeting had helped define the scope of the work and the actions needed to initiate positive action. He emphasised the need to be realistic and tackle what is a huge challenge one step at a time.

The panel session "Technology that makes money" focussed on the areas that are subject to the most change and consequently investment. However deployment is changing in a world where rapid experimentation and scaling are required. The discussion also focused on the relationship between technology suppliers and end users and the need for greater trust with long term partnerships.

The following speech was from Stephan Kexel of Atomos, a company that has used new technology to fill a gap left by the demise of video tape and new display technology. Their portable combined recorder and display is another example of the democratisation of content production and disruptive technology.

Critical Success Factors

Anthony Rose from Beamy took delegates in to the "Next generation TV". He explained how our mobile devices can become an even more integrated part of our main TV viewing experience and how we will discover programming suited to our needs. He went on to link this to new advertising concepts, analytics and monetisation.

Mark Kornfilt was interviewed by John Ive as he explained the concept behind Livestream, of which he is a co-founder. Livestream connects live events and viewers at a level that mainstream broadcasting cannot address. This concept didn't previously exist except for big budget productions that can afford to rent satellite time, but with the internet the economics change dramatically. Initially this was seen as a software cloud-based service, however Livestream have ventured in to hardware as well to ensure the optimum experience and quality.

Collaboration was the topic of Mark Harrison's talk. In addition to his role in the BBC, he is also the chair of the DPP (Digital Production Partnership). Interestingly here was a broadcaster telling technology suppliers that they should embrace collaboration and partnerships because it's good for business. Mark put forward a convincing argument, further strengthened by the collaborative success of the DPP file delivery specification.

Attention then turned to the debate "Will we recognise our industry in 10 years' time?" The presenters, each with five

minutes to make their pitch, had to convince the audience that IT and IP are going to have an even greater and more profound effect on our industry than perhaps we first thought. Their arguments were clearly compelling as the motion was passed almost unanimously.

The closing panel reviewed what had been covered over the final day and helped to summarise some of the key messages for delegates to take a way with them.

In Conclusion....

After two half days of intensive discussion and debate, a lot of ground had been covered and the feedback proved to be very positive. The most significant aspect was perhaps the changing attitude towards IT-based solutions, the concepts discussed might have been treated with doubt and scepticism a few years ago, but as the debate demonstrated, they are accepted today as the way forward. Better still it seems the value of the industry is growing, so there is money to be made for the right products and services!

Technology 2014

Technology in 2014 was interesting, not so much because we saw new ground breaking developments but more because several of the trends identified in 2013 started to show greater maturity, and therefore come much closer to mainstream deployment.

The top two themes debated at conferences and events have therefore been the move to IT infrastructures driven by the underlying IP (Internet Protocol) technology and higher resolutions above HD. Progress with IT infrastructures has raised further doubts about the future of SDI interconnects. For higher resolution, cameras are starting to appear with television centric capabilities in addition to the movie style cameras which were first to be launched.

The move to IT-based solutions has been synonymous with the continued growth in multiplatform, multiscreen viewing and has even allowed companies like Netflix to pioneer 4K delivery over the Internet. The internet has clearly joined satellite, cable and terrestrial as one of the big four delivery channels.

One area that has not so far progressed as expected has been display technology. The promise of new screens based on OLED and similar developments is still present but progress has stalled with several big name companies putting their ambitious growth plans on hold. OLED screens are complex and therefore expensive to produce and at the same time chasing falling conventional TV prices. So for now, the majority of higher resolution and UHD screens are achieved with conventional LCD panels and LED backlights. Plasma displays are also losing ground as more manufacturers pull out of production.

Throughout 2014, the IABM technology team have been actively creating and participating in events worldwide. Following the transition to a new IABM website, the technology resources have been restructured and are growing in a more member-friendly way. The increased use of video is also an important development for sharing information and allowing worldwide access to IABM technology activities.

The rebranding and restructuring of IABM technology is now in place and streamlined, further strengthened with a new team member, Stan Moote who is based in North America and brings a wealth of technology and industry experience.

The IABM retains specialist consultants to provide advice and representation on technology related activities such as the environment, industry standards and

regulation. Relationships with key organizations were maintained and strengthened including the EBU, SMPTE, FKTG and similar bodies around the world.

Reports are made available to members and provide a valuable resource, especially for companies who do not have in-house specialists and cannot afford the expense of travelling to the myriad of meetings around the world. In particular, the activities of the SMPTE are reported in detail based upon the worldwide influence of the resulting standards. More information about the IABM technology team and contact details can be found on the website.

The IABM Technology Advisory Board held two meetings again in 2014, one at NAB and a very successful event at IBC. These sessions are an important opportunity to review the main themes the IABM should be focussing on and are open to technology representatives from all member companies.

Once again in 2014, technology topics were featured in many of the IABM's regular events such as member days held worldwide, IABM events at NAB and IBC, other conferences, plus the annual conference.

The IABM technology team continued to participate in and monitor the main standards committee meetings and other events where technology is discussed and debated. Reporting has been changed with a focus on the major topics in depth but with the broader information still available

through alternative reports. Paul Treleven heads up a newly formed Standards Monitoring Group that will launch early in 2015 for those who need active participation.

Many articles have appeared in magazines and other publications authored by IABM team members. IABM presentations were featured at several international conference sessions including NAB, BVE, TVBEurope, IBC, CCBN, BIRTV and InterBEE. In addition, the IABM were invited to chair or moderate several events, seminars and conferences. This positive development indicates that the IABM is increasingly seen as the voice of authority worldwide.

Several of the IABM awards are technology based and have been managed by the technology team with an independent group of judges representing the broad spectrum of specialization and geographies.

One IABM highlight event was based around file delivery, as in previous years in collaboration with the BBC. A combination of presentation, demonstrations and panel discussions proved to be a well-attended and lively combination. The IABM filmed the proceedings so members could experience the event from anywhere in the world.

Training is an important initiative for the IABM and its members and as much of this is technology based, contributions have been made to course content. Regular updates are provided through the

IABM website and the Technology News distributed monthly to members who opt in. Technology News provides a summary of the key activities over the prior month and upcoming events with the option to click through to the website for more detail. This is an important and dynamic source of information for members.

The IABM continued to engage with the global environmental agenda in 2014 and plans to maintain this activity in 2015. Together with the 'Forum for the Future' we have joined a project to research sustainability issues and provide a more targeted resource and support for member companies. A major questionnaire was also distributed which should provide valuable research data in early 2015. Environmental developments and EMC (Electromagnetic Compatibility) continue to be reported regularly through the IABM member web pages.

Looking forward, with an expanded team and a new website, the technology team are well placed to support members throughout 2015 and beyond. The same technology themes listed at the beginning are likely to stay high on the agenda but their importance will grow as standards are developed and implementations mature. As reported last year the move towards networked environments, including live production, the Cloud and greater use of metadata to manage increasingly complex environments will continue unabated.

In 2014, the IABM actively participated in a number of Standards bodies, attending 13 meeting rounds in eight countries. Our reports are featured in the IABM Technology News newsletter and on the website. We have made preparations for the launch of a new member service, the Standards Monitoring Group, in early 2015.

EMC Standards

The IABM continues to contribute to the development of British, European and International EMC standards, attending two international rounds and four British rounds of EMC committee meetings.

The main focus continues to be on CISPR emission and immunity standards for 'Multimedia' equipment. The scope of 'Multimedia' equipment is deliberately broad to encourage economies of scale at test laboratories. The IABM has to use its professional-user audio and video industry expertise to ensure that the new standards are applicable to broadcast products alongside the interests of the IT, telecommunication, domestic audio and video equipment manufacturers and regulatory authorities on the committees.

We have submitted four sets of written comments and our active participation at meetings ensures that our comments are taken into account.

The emission standard is in place both in Europe and internationally, but incremental changes for new editions over the next few years are being developed. The immunity standard has proved controversial internationally and is not yet in place; completion is likely within a couple of years.

SMPTE Standards

SMPTE standards are key to broadcast technology and the IABM played an active part in standards development; attending all quarterly meeting rounds and numerous teleconferences. In the last year, SMPTE published 32 new standards documents and another 32 document revisions / amendments. There are currently about 150 active document development projects. High-profile project topics include:

UHDTV and Better Pixels

Two projects on UHDTV transport – one using multiple 10Gb/s optical interfaces, one using multiple 6, 12, 24 Gb/s electrical and optical interfaces are underway.

There are also projects to improve the fidelity as well as the number of pixels; High Dynamic Range (HDR). "HDR Electro-Optical Transfer Function of Mastering Reference Displays" is published, "HDR Mastering Display Metadata" is close to publication and "Color-Difference Encoding for X'Y'Z' Signals" is in ballot comment resolution.

To better understand how HDR fits into a broadcast workflow, a study group on "HDR Ecosystem" was launched in 2014. The project has made good progress.

Networked Media

This work included a now completed "Media Production System Network Architecture" Study Group Report and continuing work of two Joint Task Forces. The Task Force on Networked Media (with EBU and VSF) aims to publish its Reference Architecture report by the end of 2014. The Task

Force on File Formats and Media Interoperability (the IABM is a founder) completed its report on metadata requirements.

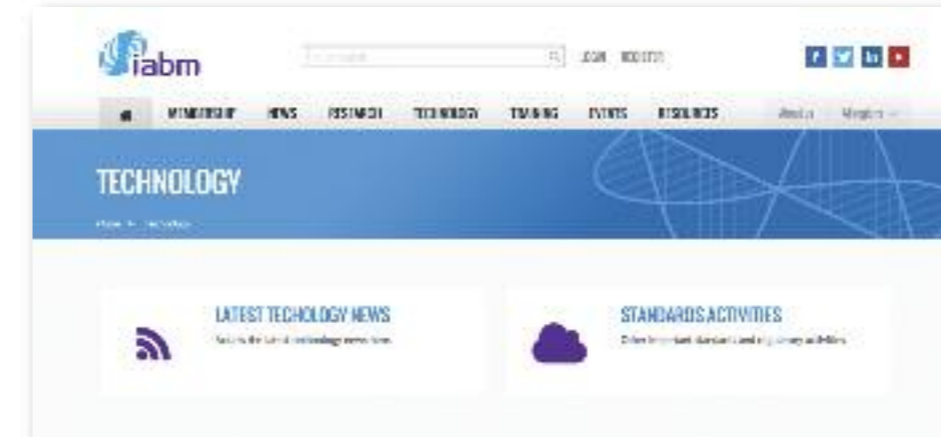
Interoperable Mastering Format (IMF)

The IMF project is developing a suite of documents to define a mastering format from which all downstream format requirements can be created in an automated way using Output Profile Lists. The project has progressed well in 2014 with seven documents published, a further four very close to publication and two "plugfests".

AES Standards

AES standards continue to be definitive for audio interface formats used in broadcast systems, often mapped into video transports. The IABM attended the two AES Standards meeting rounds in 2014.

In October 2014, the AES held a "plugfest" for its Standard "High-Performance Streaming Audio-Over-IP Interoperability" [AES67]. 16 products from 10 organizations were submitted; the vast majority of tests were successful.



Important current standards projects include: Open Control Architecture, Audio Metadata / Modelling, a new audio connector that retains XLR ruggedness with smaller footprint and easier assembly features.

Environmental Regulation Update

The IABM monitors various web-based news services and attends the UK government's Electronics Regulatory Group meetings as a recognized industry trade body. From the information gathered and regularly published on our website and in the monthly Technology News, we aim to keep members apprised of new regulatory demands throughout the world to ensure you have current information for your businesses.

This year saw two new important deadlines that many of you will have had to take action to meet.

In the USA, companies were required to have met their first year's obligations to the SEC by June 2nd 2014 under the Dodd-Frank Act for reporting conflict mineral usage in their products.

Then, as of July 22nd 2014, the EU's RoHS Directive expanded its scope to include the previously excluded category of monitoring and control equipment, which some IABM member's products will fall within. This group of products, along with medical devices, are the first types to be added to the original scope and now require full compliance. The end game for RoHS is the extension of scope to all types of electrical and electronic equipment by July 2019.

For the US conflict minerals legislation, there was some last minute legal action in April aiming to at least delay the deadline. This was unsuccessful, but the lobbying for amendments to the regulation continues. One of the disputed points of law from the April court hearings is that it was claimed that the disclosure requirements of the Act rule violate the First Amendment because it compels businesses to report information which is not "purely factual and uncontroversial." The Court of Appeals for the District of Columbia announced in November that it has granted a petition for rehearing this aspect of case. It is hoped that the position for businesses will be clarified before the next SEC reporting deadline of June 1st 2015.

As commonly happens in a global marketplace, there is considerable pressure to adopt similar measures in other countries. In Canada, a private member's bill which proposed similar legislation, was first introduced in March 2013, but was defeated at its second reading in September 2014. Meanwhile, the European Commission proposed its own rules to tackle conflict minerals in March 2014, but with largely voluntary measures and no obligations on end-user manufacturers. These proposals have been heavily criticized by some who want to see "...harmonization between the European

proposal and currently operational US federal rules on corporate conflict minerals due diligence and reporting." In the European Parliament itself, similar criticisms have been made and it is expected that attempts will be made in 2015 to make the European rules have mandatory provisions, as is in the USA, and to broaden the scope for a more global approach, rather than just focusing on the problems in Central Africa. This may be a topic of discussion between the EU and the USA for the Transatlantic Trade and Investment Partnership (TTIP) trade agreement proposals still in progress.

Finally, we continue to examine the wider topic of sustainability and the circular economy as it applies to our industry. We are involved in the initial stages of a collaborative project for our industry known as "Lens to Screen" facilitated by an organization called 'Forum For The Future' which you will read about elsewhere in this publication. Part of our contribution to this is the questionnaire that went out to survey the views of IABM members in early November. If you have not submitted a response to this, please do so; we hope to publish some interesting findings from this early in 2015.



Broadcast Engineers' course and again considers networking from the broadcast engineer's point of view. It's a very practical course with about 50 per cent being made up of practical exercises. Our VSA course continues where our 'Broadcast Media Workflows - The Fundamentals,' finishes. It's a more in-depth look at the workflow and in particular considers just how new technologies and initiatives will impact the way we work and do business.

As well as our scheduled courses, we have continued to deliver training 'on-site.' This last year has seen the Academy deliver to a number of manufacturers and broadcasters. There are several advantages of an on-site delivery and whilst the courses are not specifically adapted, our instructors are able to place emphasis on the modules that are particularly relevant to the organization they are delivering to.



This year has seen a major departure in the way we source and offer our training.

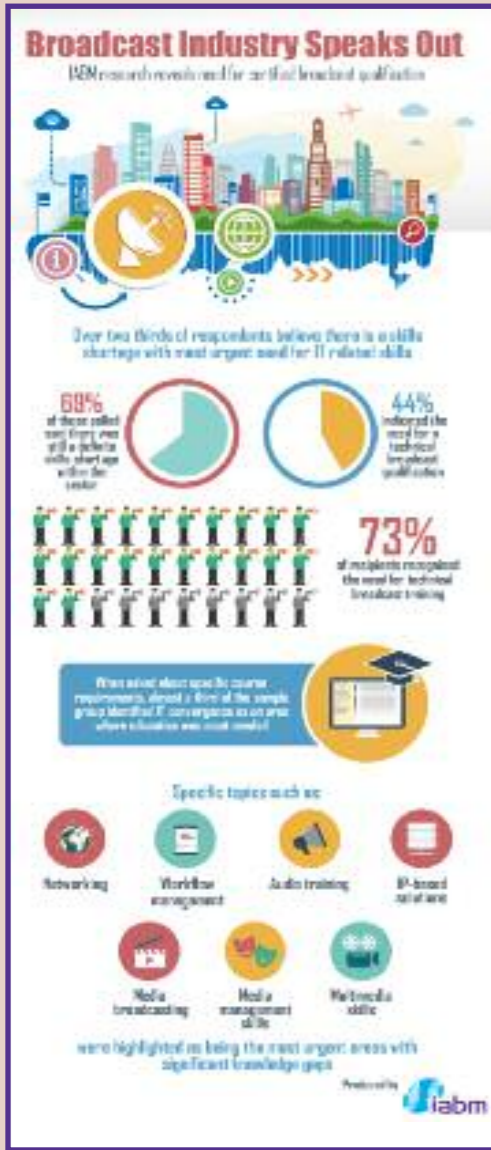
As well as continuing to design and deliver our own new courses, we have started to partner with other, high quality, training providers to increase the number of courses that we can offer to our members. By working with our first two partners we have been able to offer two further technical courses and a whole range of 'soft skills' courses. These soft skills courses are again something that our membership has requested on a number of occasions, and the company we have chosen as our partner in this field is a well-established provider with a list of blue-chip clients.

Two new 'IABM designed' courses have been completed, these being 'Advanced Networks for Broadcast Engineers' (ANBE) and 'Video Systems and Applications' (VSA). ANBE builds on our very popular 'Network Essentials for

It is probably safe to say that organizations within our sector rely heavily on advances in technology and the adaption of innovations to guarantee that they do not stagnate. However, if we do not invest in learning, development, training, education and the continuous up-skilling of our employees, then we will struggle to remain competitive in a crowded and rapidly evolving environment.

It was with these very thoughts in mind that the members board of the IABM decided to make a major investment in the training arena. Indeed, 2014 saw the third full year of operation for the IABM Training Academy. In the three years we have been operational, we have continued to work towards providing our members and the sector in general, with training that addresses real needs within our industry.

We remain responsive to voices within broadcast engineering that tell us the subjects we should be delivering training in, and we value the input from across the whole spectrum of our membership and beyond. Also the unique position of the IABM within the broadcast sector means that the training we offer is not tied in to any manufacturer, vendor or broadcaster. Our training is truly independent and can offer our delegates a balanced and impartial view of the subject.



2015 Training Courses

- **Advanced Networks for Broadcast Engineers** – 25/26 March 2015
- **An Introduction to Broadcast Technology** (online training)
- **Audio & Video Fundamentals for Engineers** – 17/18 March 2015
- **Broadcast & Media Technology – Understanding your Industry** – 04/05 February 2015
- **Broadcast Technology Workflows – The Fundamentals** – 10/11 February 2015
- **Compression Fundamentals & Applications** – 17/18 February 2015
- **Network Essentials for Broadcast Engineers** – 23/24 March 2015
- **Technology Product Finance**
- **Understanding File Formats** – 11/12 March 2015
- **Video Systems and Applications** – 9/10 March 2015
- **Soft Skills: Presence, Coach, Influence, Sell, Perform, Lead, Enchant**



Training Case Study

Coronation Street – one of the most iconic streets on British television. First broadcast in 1960, the ITV soap opera has undergone significant changes, including script, direction, characters and actors.

However, the cobbles of one of the nation's best loved dramas have stayed the same. In 2014, production of the show was moved from its home at Granada Studios in Quay Street in Manchester to the MediaCityUK complex some two miles away at Trafford Wharf. The much talked about move was completed in January 2014 after two years spent on perfectly recreating the street, brick by brick.

The Challenge

The new dedicated state of the art studios now deal with the end to end production of Coronation Street, from script through to delivery. All the broadcast equipment on site has network capabilities, enabling them to be connected together and operated remotely if needed. The move did, however, present a series of challenges to the new engineering team, with the entire operation changing technically due to the production's relocation.

"With the move to the new studios, we now have our own technical department. As a result, we recruited six broadcast engineers from both ITV and the wider

industry to support the production's two technical managers. However, due to the nature of the new equipment, particularly its capacity for networking, there was the requirement to get the team up to speed in terms of networking skills," explained Stan Robinson, Technical Manager Coronation Street, ITV Studios.

"Traditionally broadcast engineers had a certain set of skills and approach to technology. Likewise for the IT world. Now, with the two worlds rapidly converging there is an ongoing need to supplement those skills."

The Solution

Robinson turned to the IABM Training Academy to deliver the training through its Networks Essentials for Broadcast Engineers course.

"The IABM is a valuable resource to tap into and plays an important role in overcoming the skills shortage. As part of the planning process during the move, we recognised the need for training and I began investigating our options. I met with the IABM's Training

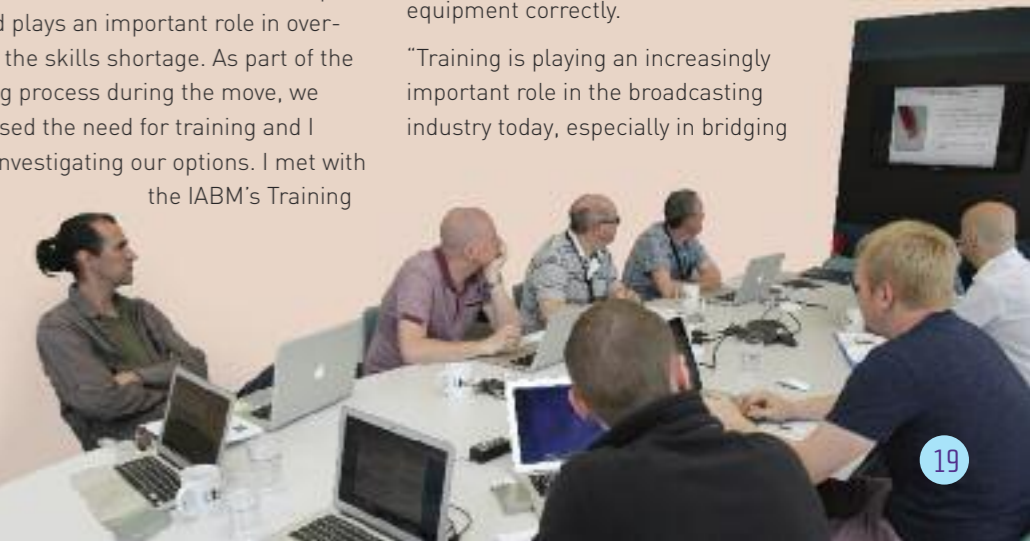
Manager Steve Warner at IBC and we began to discuss the possibilities," said Robinson.

"I attended a pilot course last year on file formats that I gave feedback on as a practitioner. It was a great course and gave me a good idea of what to expect from the training programme in terms of the approach taken and materials presented." The networks course was delivered over the weekend to accommodate the production taking place during the week. It covers topics such as the basic principles of networking, security, higher layer network processes, broadcast network infrastructure, and LAN standard Ethernet.

Outcomes

The course was well received by the Coronation Street engineers who were given added confidence in using the equipment correctly.

"Training is playing an increasingly important role in the broadcasting industry today, especially in bridging



the skills gap that has come about due to the convergence of IT with broadcast and budget issues.

“In the past, during the economic downturn and with the cut backs, training was either deemed unnecessary or as one area that could be cut to save money. Now, however, with the number of people coming into the industry decreasing and current practitioners getting older, bolstering skills is becoming crucial and ITV is taking training very seriously,” explained Robinson.

The IABM and ITV are in discussion over the Training Academy delivering additional courses, tailored specifically for Coronation Street’s requirements, especially around file formats in light of recent developments around broadcasters moving away from tape-based programme delivery to file-based delivery.

IABM Education Foundation (EF)



We try to work with relevant institutions to ensure that they deliver education that is relevant to our members and the sector as a whole. We also aim to promote the industry to their undergraduates as an interesting career option.

This year has again seen the IABM work with the IABM Educational Foundation (IABM EF) to give eight students from across Europe the opportunity to experience the IBC show; giving them a real taste of the industry and in many cases providing the impetus for successful careers in the sector.

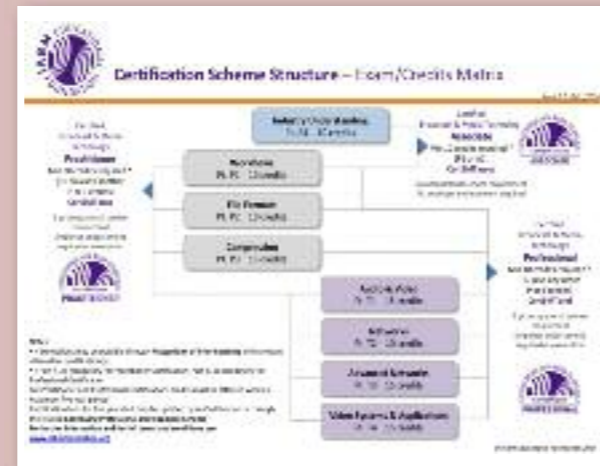
Looking to the future, next year will be really exciting for the IABM training team. We will continue to grow our portfolio by partnering with other training providers and introduce further technical broadcast courses. Also, we plan to offer project management and some in-depth IT courses. We will increase our own online offering and we will start to roll out our classroom material as ‘live-online’ deliveries. As always, we are really keen to get your thoughts on our training input and welcome suggestions for future courses, seminars and workshops.

During 2014 we’ve also seen the full roll out of the Technical Certification Scheme by the IABM EF. The Foundation is an independent, charitable body which offers the Certified Broadcast and Media Technologist qualification at three levels, Associate, Practitioner and Professional. For the first time, personnel working in this sector have a real opportunity to evidence their understanding and experience to further their career.

Courses from the IABM Training Academy prepare delegates for specific Certification examinations.

Although formal training is not a prerequisite for Certification it’s a great preparation for the examinations. Obtaining any level of the qualification is really simple. Examinations are delivered online through a state of the art proctoring system are accessible anywhere in the world 24/7 provided you have a good internet connection. For an introductory period they are also free of charge. Each examination provides credits towards Certification at the relevant level. Candidates who want to certify at Practitioner and Professional level also have an associated occupational service requirement.

See www.iabmfoundation.org for more scheme and syllabus information.



Annual Review APAC – Peter Bruce, Director, APAC Region

In 2014 the IABM made a significant change to the approach to IABM activities in APAC. Since the opening of the APAC regional office in Singapore and appointing Peter Bruce as Director it has boosted the focus. The objectives are to increase membership in the APAC region; focus more on activities within APAC for those visiting the region on international business and increase in the region.



Events

In 2014 the IABM had significant presence at the main industry events in APAC such as: CCBN and BIRTV (China); Broadcast Asia (Singapore); Broadcast India and InterBEE (Japan). At the key shows the IABM had booths and held networking events. The objective of the networking events was to bring the visiting members together with members already in the region. The participation was increased with a higher number of locals during activities. The IABM made an inaugural “APAC” members evening on the eve of IBC in Amsterdam. The IABM delivered presentations on market trends at the executive breakfast at Broadcast Asia and also took part in the opening ceremony and conference during the 50th InterBEE in Japan. The IABM has increased the facilities for members during such trade shows with meeting rooms and translators available where required.

In 2015 the IABM will look to increase the number of supported shows and activities around them. Adding to the shows they represented in 2014, the IABM will also be

present at the ABU Digital Broadcasting Symposium 2015 in Malaysia and KOBA show in South Korea. Additionally, increased activities such as a marketing seminar in China, APAC networking event at NAB and InterBEE and stronger presence at the main supported events in the region are planned.

Membership

The end goal of increasing the activities and having local presence in APAC is to boost the IABM membership. Members from the APAC region currently represent approximately 10% of the IABM’s overall members. Although the IABM has performed an excellent job in hosting and helping their local international sales offices of member companies from outside of the region when visiting for exhibitions and events, the increase of true APAC companies will happen when more relevant activities are introduced. This will be ramped up in 2015 with the attendance at more localized events such as ABU’s Digital Broadcasting Symposium 2015 in Malaysia and seminars in China. The IABM

has some very significant IABM members in APAC but they are often signed up through their European sales offices. The relevance of activities in APAC will increase the membership in its own right.

The new membership structure has changed to allow any regional office to be a member, no matter which region signs with the IABM. Therefore, the first goal is to increase the awareness to those regional offices that did not directly sign with the IABM. Increased activities and presence of a Singapore office will help this task. Secondly, to increase the true APAC members, the focus will be more visits to those APAC offices. Indian and Chinese companies are a focus for where the increase of members can come from. The new membership categories have helped, as System Integrators now see it relevant to sign up. We also see Indian companies re-engaging and are starting to see interest from China emerge with some new member sign ups in 2014. In 2015 the focus will be re-signing the big Chinese companies that have been members in the past, which in turn should help pull the small companies in.

As the APAC membership grows the objective for 2015 is to set up an APAC regional division of the IABM made up of APAC’s members. The aim is to have this in place by the end of the year.

Technology

The APAC region has participated in the AIBD’s (Asia Pacific Institute for Broadcast Development) Seminar on Broadcast

Management. Held in Kuala Lumpur specifically for Telecom Malaysia (TM), the objectives were to present to TM the technologies within the broadcast sector and focus their future broadcast and media plans. Additionally, the presentations during Broadcast Asia and InterBEE have helped explain the business survey results to the APAC members.

Training

Already plans have commenced to increase IABM training activities in the region. The IABM will train up local APAC training instructors to more effectively carry out the set IABM training modules. The training modules will be quoted though APAC System Integrators and discussions with regional TV stations to have the IABM training as a standard for their companies. Training is already booked in for January 2015. The ultimate goal is for the IABM to have training in China with local trainers. The Singapore office is working with the AIBD’s training group to initialize sponsored training for their members (TV stations) in South East Asia.

The IABM has been forward thinking in setting up an APAC region and the expected result will be increased event and participation at those events; increased training; more detailed market surveys for APAC and increased membership from APAC. It is all leading to building a growth for the IABM in APAC.

The View from North America – Caryn Cohen, Director, North America

When the opportunity to help grow the IABM in North America was presented, I immediately wanted to be part of it. The IABM offers unique value to manufacturers that many vendors in North America are not aware of. I've seen first hand the challenge vendors have in reaching new markets outside of domestic and how much help the IABM can offer to assist them in reaching these goals.



The broadcast and media entertainment market is global and there is no other association that looks after these vendors from a global perspective. Marketing, sales, distribution, technology and cultural differences are all part of the intelligence IABM has to offer members to improve their businesses.

Whilst the technical standards and needs of the global media industry vary, the business needs and best practices of the vendor community have common challenges and goals. The major shows such as NAB and IBC both have global attendance but how vendors approach each show and sell to each market vary. Successful global companies 'act locally' in each region to better serve their customers. The IABM has various benefits in place to help even the small and mid-size vendor achieve global reach with localized adaptations for each region.

For example, the North American team is comprised of industry veterans such as

Stan Moote who leads our CTO Advisory Board. If a manufacturer has a question or needs advice, Stan is there to help and provide a specialized, well informed industry perspective. This is invaluable to new players in the market that need to get up to speed fast. Stan's insights also provide a wealth of knowledge for vendors that have been in the industry a while but need to navigate the changing landscape of the business.

The North American team regularly attends shows such as SMPTE, CCW, SATCON, SVG, HPA, and NAB. We are here to give vendors a chance to look at how and why these shows can help their business. So much of the business is about networking and having presence at these shows helps to extend that network.

In 2015, we plan to host several webinars covering topics such as: Justifying the NAB & IBC trade show spend, Insider's guide to M&A, How to sell abroad, Best practices in product management, Environment



Sustainability, and many more. We are always open to topic ideas that are of interest to members. If you missed, 'The Road to Winning a Technical Emmy' webinar this November, hosted by Stan Moote, it is available on our website for members to access.

Also coming in 2015 we will debut IABM member lounges at NAB for members to relax away from the show floor, grab a bite to eat, have a private meeting, check email (free Wi-Fi) and network with each other. We also plan to hold member receptions in various locations both on the East and West coasts.



Vision for 2015 – Peter White, IABM CEO

In many of the foregoing pages we have highlighted the tumultuous change that has hit the broadcast media technology chain in recent times.



Clearly this change is both permanent and in itself changing and reforming on a continuous basis, so 2015 will present further challenges for our industry.

What is vitally important for the IABM, and we believe for our members and the industry alike, is that we as your trade association continues to map these changes, report on them, interpret them and keep our members continuously informed.

Last year I referred to a completely independent IABM brand research survey we commissioned at the very end of 2013. This was an in-depth piece of research that mapped both qualitative and quantitative response data.

While being generally very complimentary about the IABM we were more focused on the areas where we could improve. Many of the initiatives introduced and completed in 2014 had these improvement points at their heart and as we exit 2014 we hope that our members and the industry have noticed a positive change in us.

At the end of 2014 we undertook some targeted research regarding the IABM membership penetration specifically across the broadcast value chain to see where we were strong and where we might be weaker. This has given us greater focus for our approach in the new year ahead.

So what of the IABM in 2015? Well firstly, we will build on the new member categories system that we have just launched. We now encapsulate the whole supply ecosystem with the introduction of Bronze membership and we will develop new benefits appropriate to each of the new classifications.

We will "shout" both louder and with multiple voices across the globe. It is our intention to grow our membership in 2015 dramatically.

We have some building blocks in place. We have recruited a Director of North America and a Director of APAC and by the end of 2015 we will have established Regional Councils in both these geographies.

This is all part of the regionalization of the IABM. For us to be truly effective and reflective of the issues in the home territories of our members we must put people and boards on the ground to facilitate this.

We will develop and deliver more "C level" meetings in these different territories and build on our conferences, receptions, breakfast briefings and state of the business updates throughout the world.

In addition, to assist our regionalization, our new website will be further developed

to provide configurable and customizable interfaces with local content and our CRM will be further developed to ensure we only communicate to individuals in members companies what they want to see.

Please ensure you interact with us to specify your requirements and we can hopefully banish badly targeted communications from your inbox.

We will also be ramping up our technology meetings and events, webinars and communications. So if you are a CTO then make sure you join the IABM Technical Advisory Board.

With market research we will continue the successful partnership with Devcon through the auspices of IABM DC and produce yet another iteration of the highly acclaimed Global Market Valuation & Strategy Report.

Within the IABM Business Intelligence portfolio we will look to refresh and revamp so our data always remains on point for your requirements. We will be recruiting a Research Analyst in 2015 to assist in this development.

In the Training Academy we will look to develop access to a virtual classroom delivery facility and progressively redevelop our existing courses for suitability on this platform. We are also currently investigating some pure e-learning courses with subjects that are right at the forefront of what's happening in our industry today. These are all part of an initiative to globalize the IABM content.

So wherever you look for us in whatever part of the world, we hope that there is a very good chance you will find us. We view ourselves as your business partner and we hope that we can bring the added value you need to give you that edge in this competitive world.

2015 is an election year for the IABM Membership Board and 10 new board places will be available. We will be asking for nominations in the spring so please take the opportunity to get involved and shape the future of your trade association and hopefully in so doing impact on the industry as a whole.

There is a quote on our website that says, "Bringing the international supply community together to maximize their potential in the marketplace". For me this sums up what the IABM is about.

I say each year that the strength of the IABM is the product of its membership and this will always be the case. We remain dedicated to representing and promoting our industry and informing and supporting our members.

As with all effective trade associations in whatever sector they may be they are the device by which the words of many can be collected and put together as a much more powerful voice. Like a great choir the sum of all those voices takes on a synergy that is capable of moving most things.

We look forward to working with and standing alongside you again in 2015.

Broadcast Technology End Users

- In 2 to 3 years only **50%** of broadcast capex will be with traditional broadcast vendors
- 63%** of end users buy storage direct from IT vendors
- Over **80%** of end users prefer buying "best of breed" rather than "end to end" from one vendor
- 70%** of end users are positive about the next 2 to 3 years
- Best fit for requirements and greater efficiency saves money are the main factors when buying broadcast technology
- After sales and service support second most important factor

www.theiabm.org

At the start of a new year we have the benefit of hindsight. For this industry, 2014 was a better year than the previous one. As we approached the end of the year and companies filed their returns for the whole of 2013, the first half of 2014 and in some cases Q3 2014 a better picture was emerging.

Overall, across the broadcast and media technology sector, companies saw a recovery in sales and some profits growth at last. However, some companies and especially the smaller ones, found growth elusive but overall the market conditions were brighter.

Fortunately for our members, the IABM has a comprehensive market intelligence service. We track markets and analyse and report on what we see happening. Members benefit from regular insights into market conditions and are able to benchmark their own performance against that of their competitors and the market as a whole.

During 2014 we have seen a return to growth. That growth is visible in small and medium sized companies as well as the larger businesses. Segment by segment the picture is quite different and as is often the case the larger companies did much better than the smaller ones. The IABM Industry Index tracks the published financial performance of some 70 companies across the whole broadcast and media technology business. At the end of the year it was showing the average company year-on-year sales growth at 6.5% compared to less than 1% at the end of 2013.

Our IABM Benchmark Report compares key financial fundamentals within the sector and compared to other sectors. In December 2014 this showed median Profit-to-Sales at 7% with the upper quartile at 15% and the lower quartile 2%. The median gross margin is still at a very respectable 59%. Liquidity has improved in 2014 despite there being some deterioration in collection of accounts receivable. Investment is research and development has fallen slightly although it's still a respectable 14% of sales.

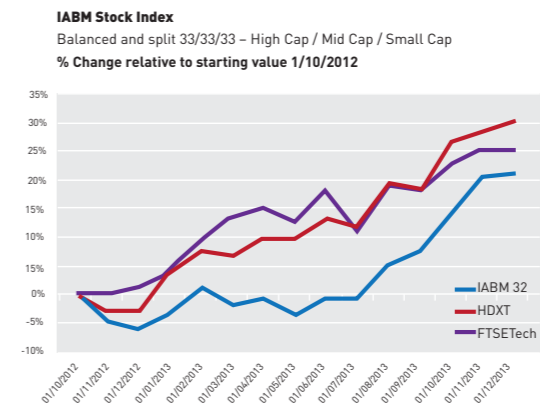
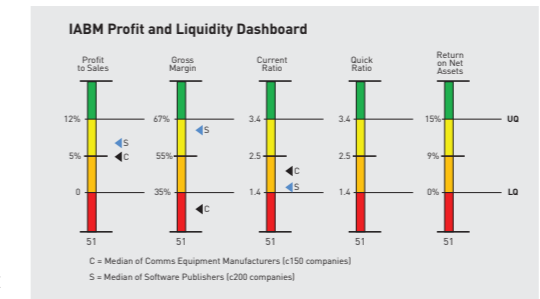
Twice a year we poll the opinions of "C level" executives in member companies. This helps us stay close to our members and the operating conditions you are facing and it helps us validate the market situation and identify issues quickly. Our IABM Industry Trends Survey is free of charge to members (excluding Bronze) but only to those who participate. Our most recent survey shows that the majority of members expect 2015 to be similar to 2014 with a third looking forward to an improvement. Only 10% see a material downside risk.

Twice each year we undertake the IABM End User Survey to identify and disseminate the

key demand side issues to our members. As far as technology investment is concerned users continue to say that saving money and increasing efficiency are the key priorities when purchasing decisions are made. These are followed by after sales service and support and then the total cost of ownership. However, we continue to see a transition from Capex spending to Opex spending through increasing adoption of service based IT operating methodologies.

These technology transitions mean that some segments of the industry are doing much better than others. In order to see that more granular picture we undertake our highly regarded IABM Global Market Valuation and Strategy Report. All our other market intelligence services are free to members. The report offers an unprecedented depth and breadth of analysis looking at hundreds of individual product types across each and every segment of the market. It analyses five years of unit shipments and revenues and forecasts the immediate years ahead with granular detail. Many member companies partner with us to provide their own shipment data under NDA which delivers a richness and legitimacy that cannot be matched. We published the latest study during 2014 and this work was undertaken by IABM DC, our joint venture with Devoncroft Partners. There are a number of attractive preferential purchase options for members to enable you to access the data and analysis that you need to guide your critical business decisions.

In 2015 our market intelligence services will be considerably enhanced as we continue to strive to keep you close to the pulse of what is happening around the world in the broadcast and media technology business. Make sure you take advantage of our members' services in this arena. For further information see www.theiabm.org/membership



State of the Broadcast and Media Manufacturing Supply Industry

Report highlights

- Year on Year Sales Growth**: 7.7% (Up on last report)
- Year on Year Profit Growth**: 11.2% (Down on last report)
- Companies in Profit**: 68.1% (Down on last report)
- Profit to Sales/ Return on Sales**: 8.1% (Down on last report)
- R&D spending - average of**: 14% of sales
- Market Confidence**: IABM Confidence Ratio down to 3.8

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Since its first edition in 2006, the Global Market Valuation & Strategy Report has been widely recognized as the most authoritative market-sizing and forecasting report in the broadcast and digital media industry.

The latest edition of the report represents an evolution from previous versions of this report. It has been produced through a unique partnership between the IABM, the trade association that represents media technology suppliers worldwide, and Devoncroft Partners, a leading provider of market intelligence products and services to the broadcast and digital media industries.

IABM and Devoncroft have joined forces and established a joint venture – IABM DC LLC – whose sole purpose is to provide high-quality market sizing and forecasting data, and related products and services. The combined experience, skills, and intellectual property of IABM and Devoncroft have been combined to produce the 2014 report, which is a result of the collaboration between the two organizations.

Unique Collaborative Framework Provides Best-In-Class Data

This is the only report where broadcast industry vendors come together in a collaborative partnership, under a

mutually-agreed framework of strict confidentiality, to share their revenue data, future forecast and detailed information on what drives their businesses.

Partner data is augmented by interviews with hundreds of industry insiders (including vendors, service providers, and broadcasters), publicly available information and exhaustive research into each industry segment, sub-segment and product category.

The result is the most comprehensive model ever created of the broadcast and digital media industry. It encompasses more than 2,000 companies ranging from large service providers and technology vendors to small start-up businesses just breaking into the industry.

Broadcast Industry Market Sizing

Using 2012 as our base year, this report values the broadcast market at \$39 billion. Our analysis divides the industry into nine separate segments – eight product-oriented segments, plus a single segment

that aggregates services purchased by broadcasters. In 2012, the global market for broadcast products was \$19.8 billion, or 51% of the total industry value.

The bulk of this report is dedicated to providing detailed information on the composition of this product revenue at the segment, sub-segment, and product category levels.

The remainder of the broadcast market is comprised of service revenue, which comes from a wide variety of sources including transmission infrastructure; managed services; systems integration, consultancy; and the rental and hire of facilities, outside broadcast resources, and specialist equipment.

Taken together, the broadcast market was valued at \$39 billion in 2012, flat versus the previous year, following growth of 6.8% and a growth of 4.6% in 2010 and 2011 respectively.

Although it is difficult to generalize about such a large and dynamic marketplace, broadcast industry growth in 2010 and 2011 was due to a number of factors, including an improving economic environment in North America, the transition to HDTV in China and other emerging markets, project spending in Europe in preparation for the switch-off of analog transmission and industry

seasonality that is typified by the “four-year cycle,” which ended in 2012.

However, readers should note that each segment has been subject to major shifts, some of which have changed the entire structure of the market. Even in market segments where revenue appears to be flat compared to previous years, there may be significant changes to the composition of the underlying product revenue. Many of these factors are discussed in each of the segment reports that are contained within this report.

The total size of the broadcast market is shown below, including details of each market segment covered in this report.

Market Segment	Top 5 share by	Concentration
Acquisition and production	40.0%	Moderate
Post-production	44.4%	Moderate
Content and communication infrastructure	26.0%	Moderate
Audio	39.3%	Moderate
Storage	31.9%	Moderate
Playout and delivery	36.7%	Moderate
System automation and control	32.1%	Moderate
Test, quality control and monitoring	34.4%	Moderate
Services	30.4%	Moderate

Source: IABMDC® 2013



Broadcast Industry Market Fragmentation

The market for broadcast technology products and services is a fragmented one. The table below, which shows market share for the five largest players in each market segment, indicates that each segment has many participants and there is no single dominant player.

This is not a surprise considering that there are approximately 2,000 firms chasing \$39 billion of broadcast industry revenue. However, taking into account that nearly half of industry revenue measured in this report comes from the services sector, it becomes evident that there are a large number of small hardware and software vendors in the broadcast industry.

Market Segment	Revenue	% of total
Acquisition and production	\$4,577m	11.8%
Post-production	\$1,205m	3.1%
Content and communication infrastructure	\$2,407m	6.2%
Audio	\$1,554m	4.0%
Storage	\$1,981m	5.1%
Playout and delivery	\$6,398m	16.9%
System automation and control	\$1,003m	2.6%
Test, quality control and monitoring	\$724m	1.9%
Services	\$19,100m	4.9%
Total market	\$38,949m	100%

Source: IABMDC® 2013

The IABM DC Global Market Valuation & Strategy Report

We believe this is this definitive market sizing report for the broadcast industry.

It provides market sizing data for the entire broadcast industry (approximately 150 product categories across nine segments). In creating the report, we built a robust data model of the entire broadcast industry. The data model includes approximately 2,000 companies including hardware vendors, software vendors and service providers.

One of the key inputs to this data model is the comprehensive data submissions we received from leading industry vendors who have signed on to be partners in this industry-wide collaborative effort. These partner companies have agreed to share historic and future projected sales data at a granular level according to our segmentation model of the industry. They have also provided extensive input to the report through an interview and feedback process.

In addition to partner data submissions, many data submissions were received from non-partners. Data was also

gathered from a wide variety of public and proprietary sources. We also did an exhaustive review of company financials, and interviews with end-users about their past and future planned purchasing strategies.

In creating the report one of our objectives was to allow clients to purchase the entire report (all product segments) or just the specific segments that are of interest to them. Therefore the report was designed from the beginning to be modular. This structure is important because the broadcast industry has a large number of small companies who don't want and/or can't afford to buy a monolithic report about hundreds of product categories that may not be relevant to them. Within the report, there are nine individual product/segment reports, each of which are sold separately.

The report is currently available via the IABM and/or Devoncroft Partners with the next edition being available in early 2015.



The Members Board

The IABM Members' Board is responsible for the governance of the IABM and approval of its strategic plan and budgets, which are then implemented by the IABM team. The exciting changes that have taken place within the IABM over the last few years, and our vision for 2015 and beyond, are driven by our board of members. The IABM is your trade association and our board represents you and helps decide the direction and new initiatives that the association takes.

The Members' Board of the Association is elected every two years, comprising representatives from 15 member companies and four appointed positions. Our current board has a mixture of representatives from large multi-national companies to small companies of less than 50 employees. These board members hail from the USA, Canada, Spain, Netherlands and the UK.

A ballot election for a new Board will take place during June with the new boards first meeting scheduled for Thursday 30th July 2015. In spring we will be asking for nominations. Please consider putting yourself forward. We hold quarterly board meetings and we have an excellent video conferencing system so your location should be no barrier to participation. Please consider getting involved and shaping the future of your trade association.

Jan Eveleens – Chair - Axon Digital Design

Jan is the CEO of Axon Digital Design. Prior to joining Axon he was a member of the Grass Valley executive management team and responsible for their broadcast camera division. Jan started his career with Philips Electronics where he was deeply involved in D2-MAC, PALplus, HD-MAC, and DVB/MPEG-2 transmission systems as well as Conditional Access systems and watermarking solutions.



Mike Purnell – Argosy

Mike is the founder of Argosy and is joint MD as well as Business Development Director. His entry into electronics and the broadcast industry began in 1968, working as a Sales Engineer for ITT Cannon. He then worked at Hellermann and the Vishay Group before deciding to become self-employed in 1976. Argosy was formed as Ltd Company in 1984 and has since become an important supplier, focussed entirely on the Broadcast Industry. Mike is also a member of the Chartered Institute of Marketing.



Kevin Usher – Avid

Kevin is a Director in Avid's Media Enterprise segment marketing team with worldwide responsibility for Avid's Storage and Server solutions. Throughout his 18 year tenure at Avid he has held a variety of positions which included managing the Solutions Development team, Product Management and Product Marketing for Avid's professional video products in EMEA. His experience in the broadcast, television and communications industries spans over 28 years with previous positions held at Grass Valley, Sony Broadcast, Independent Broadcasting Authority and Phillips Telecommunications.



Marco Lopez – Grass Valley

Marco Lopez is the President of Grass Valley, a Belden Brand. He was appointed to this post following a lengthy career with Miranda, one of the entities combined by Belden to create Grass Valley, a Belden Brand, in 2014. In this role, he's responsible for all worldwide operations for Grass Valley, the flagship brand of Belden's broadcast platform. Marco has had a distinguished career of over 20 years in the broadcast industry, having led teams in various functions at Matrox Electronics prior to joining Miranda.



Tom Favell – Hi-Tech Systems

Tom is Managing Director of Hi Tech Systems, which he founded in 1987 having worked for companies such as Sony and Michael Cox Electronics. Heavily involved in product design, he also clearly keeps an eye on the business, and is fully aware of the pressures placed on small companies during difficult trading conditions and by increasing regulation.



Mike Shaw – IBIS

Mike Shaw is Managing Director of IBIS, a long-established provider of media asset management and workflow solutions. Mike joined the BBC in 1987 as a direct entry engineer from Bristol university and spent 10 years at the organisation where he was instrumental in evolving channel playout into the digital era. He has been with IBIS for 17 years during which time it has moved from providing automation and traffic systems into media management and workflow with the evolution of file based systems.



Brian Cabeceiras – Imagine Communications

Cabeceiras serves as Chief Strategy Officer for Imagine Communications, responsible for market research, strategic planning, business and corporate development. In addition, Cabeceiras leads the Company's CTO Council, responsible for aligning their Product and R&D strategy. Cabeceiras joined Imagine Communications as Vice President of Sales for the Americas with the October 2005 acquisition of Leitch Technology, and subsequently led Strategic Marketing and Technology for Imagine Communications. Previously he worked with SeaChange International, where he served as president of the company's broadcast server division.



Nigel Wilkes – Panasonic

Nigel has worked for Panasonic since 1999, and is currently the UK & Ireland Sales Manager heading up the Broadcast team. For six years Nigel was at the forefront of the HD revolution supporting productions such as Band of Brothers and Planet Earth. He has a wide experience in various industries, including manufacturing, component supply, TV & film production support.



The Members Board

Paul Nicholls – PHABRIX

Paul Nicholls is the Sales and Marketing of PHABRIX, an innovative test and measurement company head-quartered in the UK. Paul joined PHABRIX in 2008 to establish a world-wide distributor network and to promote the PHABRIX brand. Previously his career included 10 years at Quantel in a number of roles entering as a Technical Author through to Applications Manager, Product Specialist, Product Manager then promoted to Marketing Manager for video graphics and special projects.



James Gilbert – Pixel Power

A Cambridge Engineering graduate, James is a Founder and Joint Managing Director of Pixel Power Ltd, which has been delivering broadcast graphics solutions for 25 years. His current role encompasses world-wide interface between customers and technical aspects of product development.



Roger Thornton – Quantel

Roger initially joined the Quantel marketing department in 1985 and moved on to become Head of Publicity. Quantel develops innovative, world-leading content creation systems for broadcast, post and DI. Roger has been an active supporter of the IABM throughout his time in the broadcasting industry, and has watched with delight as it has developed into the broadbased, truly representative industry body that it is today.



Allan Arthurs – Sony

A graduate in electronic engineering, Allan joined Sony in 1984 and has enjoyed considerable success in a broad range of roles including product management and strategic marketing. Allan is a General Manager for Sony Europe, representing Sony at a variety of industry activities, including European Broadcast Union (EBU) and the IABM.



David MacGregor – TSL

David has 50 years' experience in the broadcast industry, initially as a Design and Development Engineer with EMI and senior engineering roles for the likes of Thames, Grampian and Yorkshire Television. He later co-founded Television Systems Ltd (TSL) and is a member of the Royal Television Society; SMPTE and a member of the IBC Exhibition Committee.



Mark Osborn – Vitec

Mark is Director of Business Development EMEA/Asia for Vitec Videocom having worked in the industry for 29 years fulfilling mainly Sales and Product Management roles. He has worked for both manufacturers and distributors and is conversant with getting the product to market. He has been an active supporter of the IABM for many years and served as Chair of the Exhibition Task Group.



Jordi Capdevila Espitia – VSN

Jordi is the Marketing Director at VSN, Innovation and Media solutions, which provides a wide variety of software and manufacturer goods for the broadcast industry. Throughout his young career he has helped several companies develop B2B marketing activities to better understand their customer needs and provide innovative solutions to fill market's gaps. At VSN he is in charge of helping the company grow in emerging markets and fill the needs of developed markets.



Appointed members

Derek Owen – IABM Non Executive Director

Derek has been involved in the broadcast industry for over 50 years. After engineering positions at EMI and BBC and sales roles at RCA and ProWest Electronics he was a co-founder of Pro-Bel in 1977. After his retirement in 1998 he acted as an advisor to several companies. He has been involved with the IABM since 1978 serving on every members' committee and board since then. Derek was made an Honorary Member in 2006 and is Chairman of IABM Investments Limited.



Graham Pitman – IABM Vice Chair

Graham is Vice Chair of the IABM and has a broadcasting career spanning four decades. Starting out at BBC engineering, Graham was a co-founder at Pro-Bel, became SVP of Sales and Marketing at Chyron, led the MBO of Pro-Bel from Chyron and subsequently played a pivotal role in merging Pro-Bel with Snell & Wilcox to create Snell. Graham has considerable M&A experience and strong connections with the financial community, he is increasingly focused upon the strategic challenges facing companies in the sector. Graham is also Chairman at Yospace, Chairman at ATG and Deputy Chair at Snell and Executive Chairman at Videcheck Ltd.



Peter White – IABM Chief Executive

Peter has been Chief Executive of the IABM since 2009 and his responsibilities include the development and implementation of the association's strategies; representing our members at executive level to organizations around the world and overseeing the smooth running of the IABM Office. He has spent most of his working life in executive management positions in the manufacturing technology, printing and IT sectors and is a qualified accountant, a former tutor for the Leadership Trust and a specialist in personal coaching for business.



Lucinda Meek – IABM Finance Director

Lucinda is Finance Director and Company Secretary for the IABM and has been with the Association since 2006. She is responsible for the IABM's financial, legal and corporate matters and is a qualified chartered accountant having trained with Deloitte Haskins and Sells (now PwC).



The IABM Team



Anna Rudgley
Training
Administrator
Contact Anna with any training or bookings enquiries.



Ben Dales
Online Marketing
Executive
Contact Ben with any digital marketing queries including the website and social media.



Caryn Cohen
Director North
America
Contact Caryn with any membership queries relating to the North American region.



Elaine Bukiej
Membership Secretary
Elaine is your primary point of contact for all member queries or general enquiries concerning the IABM.



Joe Zaller
North American
Market Development
Officer
Contact Joe with any Global Marketing Valuation Report queries.



John Ive
Director of Business
Development &
Technology
Contact John with queries on our Standards Monitoring Group and Advisory Board.



Lisa Colins
Marketing Manager
Lisa is your key contact for any marketing, events and exhibition or media enquiries, together with sponsorship or media information.



Lois Sansby
Marketing Executive
Contact Lois with any marketing queries including events, exhibitions and print publications



Lucinda Meek
Finance Director and
Company Secretary
Lucinda is your primary contact for finance and subscription queries as well as queries relating to our member board.



Peter Bruce
Director of APAC
Contact Peter with any membership queries relating to the APAC region.



Peter White
Chief Executive
Contact Peter for queries relating to the IABM.



Sonali Nair
Accounts Assistant
Contact Sonali with any invoice or payment queries.



Steve Warner
Training Manager
Contact Steve with any bespoke training requirements or certification queries.

2014 Review

Executive Industry Updates

An impressive list of key influencers and leading companies from within the broadcast industry attended our UK and European Industry Update Meeting that took place in Reading, UK during July and Cologne, Germany during October. Like the title suggests, the Industry Update Meetings are informative and informal gatherings that provide attendees with the most up to date knowledge and news from across the broadcast industry. The IABM team share their expertise on the latest market intelligence, give insight into new and emerging areas of business focus and encourage discussions and debate around current and future trends.

Executive Breakfasts and Conference Sessions

Executive Breakfasts were delivered at Cabsat and Broadcast Asia where we shared updated market intelligence from the IABM Industry Trends Survey, Index and Benchmark reports. Each event was focussed around the region in which the show is delivered and an expert panel from the local area shared local trends, information and hot topics prior to each show starting ensuring that members were well prepared to meet with new potential customers.

At IBC and NAB we delivered our conference sessions. The hour-long sessions provided an executive summary of the IABM's extensive research into the state of the broadcast industry.

Both sessions took similar themes appropriately looking at the future of our industry.

Lively debates, featuring a host of industry-leading presidents followed the main presentations. The discussions delved into the future status of the technology supply industry, the need for future-proofing and the move towards software based business models.

The NAB Advance Show Party

The NAB Advance Party is an ideal opportunity to network with colleagues and competitors in a fun and relaxing environment prior to the NAB Show opening.

The event is attended by an international guest list from the broadcast industry. The majority of guests are from broadcast supply companies but there is also representation from end-users and press.

The 2014 event took place at the Hard Rock Café on Las Vegas Strip and was attended by around 400 guests made up of Directors, VP's, CEO's and Managers.



Events for IABM Members During 2015

January

IABM Board Meeting
8th January

Content Everywhere (MENA) Exhibitor Reception
19th January 19:00-22:00

Webinar – Product Compliance and Certification
19th January

Technology Event – A look forward to UHD
22nd January, London

IABM Board Meeting
29th January

March

Cabsat Member Reception
9 March, 7:00pm-10:00pm
Novotel World Trade Centre (Pool area)

Cabsat Executive Industry Breakfast
11 March
Novotel World Trade Centre

CCBN Member Reception
25 March, 7.00pm-10.00pm
Raddisson Blu

IABM Technology Event
18 March, UK

April

IABM NAB Advance Party
Saturday 11 April

NAB Conference Session
13 April
Las Vegas Convention Center

April

NAB APAC Reception
14 April from 7pm

IABM Board Meeting
30 April

May

IABM Business Leaders Summit
14 May, USA

IABM USA Voice of the Customer Conference
15 May, USA

June

BroadcastAsia Member Reception
1 June 2014, 6:30pm-10:00pm
Pump Rooms, Singapore

BroadcastAsia Executive Industry Breakfast
3 June 2014
Marina Bay Sands Hotel

July

IABM Executive Industry C-Level Business Update (APAC)
How to market your business internationally – July 2015
China

IABM Executive Industry C-Level Business Update and AGM (UK)
1 July 2015

IABM Board Meeting
30 July 2015

August

IABM Technology Event APAC Region
4-5 August Hong Kong

BIRTV Members Reception
27 August, 7.00pm-10.00pm
Raddisson Blu

September

IBC APAC Reception
10 September from 7pm

IBC Conference Session
11 September The RAI

IBC Design & Innovation Awards
12 September

October

IABM Executive Industry C-level Business Update (EMEA)
8 October

Broadcast India Members Reception
14 October

IABM Board Meeting
29 October

November

InterBEE Members Reception
November

December

IABM Annual International Business Conference and Awards
3-4 December

IABM Summary of Services



Driving your business forward through our simple one-stop-training shop



Keeping your business ahead of the technological changes it encounters



Helping you keep on track with industry trends and the financial performance of the sector



Helping you gain the right exposure and build meaningful business relationships



Negotiated by us to add value to your business



Invaluable bank of support to tap into at your convenience

IABM
Supporting our industry
to develop, thrive
and embrace the future

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