

Broadcast, Media & Entertainment Services

White paper

Outsourcing the Media Supply Chain

The New Transformation Opportunity

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INTRODUCTION

Following a decade of rapid digital innovation, the viability of traditional broadcasting models came under significant pressure and, according to some industry predictions, was set for terminal decline as OTT services captured huge market share.

The current reality, however, is somewhat different, with hybrid services that combine traditional broadcasting with OTI infrastructure co-existing in a vibrant and highly competitive industry. Today, many operators maintain cable, satellite and DTI networks while also adding OTI options to meet the diverse needs of customers worldwide.

While this service convergence brings maximum viewing flexibility, it presents broadcast organisations with significant – and growing – operational challenges. In particular, the requirement to manage both infrastructure types while competing with pureplay OTT services such as Netflix or Disney+, puts huge pressure on operators to minimise costs while maintaining a quality offering.

The stakes are high. With growing consumer demand for everywhere access to live sports, award shows, and other event-driven content where millions of concurrent subscribers are glued to streams, the operational competence of broadcasters and non-broadcasters becomes starkly evident.

At the same time, operators must balance competing demands, including the need to keep costs competitive, maintain legacy networks and scale regional operations. This complexity has driven many to explore supply chain outsourcing as a new path forward, with even the largest platform owners evaluating their options.

SECTION 1 - Five key drivers for outsourcing

Outsourcing in the broadcasting industry is, of course, nothing new.

For over two decades, operators have contracted with specialist third parties to handle non-core functions such as IT support and call centres.

In contrast, core broadcast engineering services have traditionally remained in-house, with only incremental streamlining taking place. Today, this is changing. Operators are reevaluating what constitutes their core business in a process that shifts certain technical operations to external specialists.

Where do benefits come from?



Outsourcing allows broadcasters to focus on their core strength (delivering engaging content to their viewers)., while helping them to contain costs and bring savings. By outsourcing complex technical operations to proven industry leaders such as Globecast, they can alleviate internal pressures, ensuring scalability and resilience across broadcast and OTT ecosystems. More specifically, this allows broadcasters to focus on:

Scale, flexibility and resource allocation:

Efficient resource allocation is vital for maintaining the cost-effectiveness and performance of the media supply chain. In this context, AI can also be used to automate the allocation of computational resources based on anticipated or forecasted demand, which is particularly useful for live events and new content releases that typically see spikes in viewer numbers. By predicting these spikes, AI systems can allocate additional resources in advance, thus ensuring a smooth streaming experience without manual intervention.

In OTT platforms that deal with vast libraries of on-demand content, for example, AI can also streamline the process of content archiving, indexing and retrieval. AI algorithms can tag and categorise content automatically, making it easier to manage and retrieve. This not only speeds up the process of content delivery but also helps in managing storage efficiently, thereby reducing operational costs

Cost and technology investment efficiency:

Supply chain outsourcing enables broadcast organisations to optimise headcount, with in-house teams focusing on core activities. As part of this process, advanced automation and AI technologies help streamline content processing and distribution, reducing dependency on manual intervention

Outsourcing the media supply chain to cloud-based partners also allows organisations to share technology infrastructure – an approach which can significantly reduce the need for capital hardware and software investment. This approach reduce overhead costs, including those associated with ongoing maintenance costs and technology upgrades.

FIVE KEY DRIVERS

1



Innovation : seamless integration of advanced AI technologies:

Incorporating advanced technologies – particularly AI – into the media supply chain is creating a huge industry buzz. The potential is enormous, with AI enabling organisations to significantly enhance operational efficiencies while delivering a seamless, AI-powered or augmented user experience.

Organisations working with outsourcing partners such as Globecast can more easily and confidently remain at the forefront of these tech-led innovations without the burden of identifying and integrating new solutions in-house.

Quality of service:

Outsourcing to a cloud-based service provider can also help safeguard quality of service, both from infrastructure and content perspectives. Backed by a commitment to industry-leading service standards, SLAs and performance metrics, effective outsourcing delivers consistently high levels of quality and reliability.

For example, Al algorithms can monitor video streams in real-time to detect issues such as signal degradation, audio disruptions, or unsynchronised subtitles. These systems can then automatically initiate corrective measures or alert human operators to intervene. This not only ensures a high-quality viewing experience but also reduces the workload on technical staff, allowing them to focus on more complex problems.

Cloud adoption for flexible expenditures

Across the broadcast industry, cloud technology has become an essential tool for broadcasters and content owners seeking to innovate and reach new audiences.

From public cloud services such as AWS, Microsoft Azure, and Google Cloud to private cloud infrastructure, the option to implement diverse architectures is increasingly key to performance, enhanced security and flexibility.

SECTION 2 - Key questions to consider before outsourcing

Media Supply Chain outsourcing is not just a matter of selecting a supplier.

Instead, broadcast organisations should first consider a number of fundamental questions which will help focus their strategy

• Are your operations ready for the next phase of modernisation?

Broadcast and IP-delivered content are converging at an accelerated pace.

If your operations are struggling with inefficiencies or outdated infrastructure, it may be time to outsource the integration and management of your backend.

Globecast's expertise in media supply chain operations helps manage everything from ingest to transcoding, distribution and 24/7 monitoring, ensuring high-quality delivery.



Can you maintain high-quality service during peak events?

Major events bring spikes in viewership. Technical issues during these times can cause subscriber churn.

Globecast provides event-specific audits, stress tests, and proactive monitoring to ensure your systems are fully prepared to handle surges in demand.

• Are you facing talent shortage for key broadcast roles?

> With the retirement of seasoned engineers and the difficulty of attracting new talent for legacy technologies, many operators face staffing gaps.

Outsourcing to Globecast provides immediate access to experienced broadcast professionals, helping reduce operational risks and ensuring business continuity without the burden of recruitment.

 Do you have adequate resilience for redundancy and disaster recovery?

Operational downtime is unacceptable in today's competitive market.

Globecast allows operators to outsource redundancy systems and disaster recovery functions, ensuring operational resilience and uninterrupted service, even during unexpected disruptions.

• Are you prepared for large-scale broadcast infrastructure projects?

Upgrading or relocating broadcast facilities can strain an operator's internal resources.

Globecast helps design, implement, and manage broadcast infrastructure projects, allowing operators to focus on core operations while ensuring timely project delivery.

Armed with this insight, broadcasters can establish a firm strategic foundation for moving to an outsourced model. This includes understanding the key role of an effective partner engagement process and a clear understanding of the importance of mutual commitment between broadcaster and outsourced services provider.



SECTION 3 – The Globecast approach to Media Supply Chain outsourcing - leveraging decades of experience

Globecast is ideally positioned to help broadcasters deliver on their outsourcing objectives. A prominent player in video acquisition and distribution for decades, we provide a wealth of experience drawn from legacy broadcasting and the latest in live streaming technologies. Our expertise encompasses everything from satellite and fibre optics for content acquisition to advanced encoding techniques and CDN management for distribution. This allows Globecast to innovate while maintaining reliability and quality across our service offerings.



As part of our growth strategy, we are expanding our presence in the APAC region, building on our established Singapore footprint and targeting new markets in Indochina and neighbouring areas. This strategic investment extends into the ANZ region, where we see significant growth potential driven by increasing demand for high-quality media outsourcing services and content delivery solutions. Our approach focuses on leading the industry in optimisation and cost efficiency by leveraging mutualised technology platforms and outsourced services.

Best practice deployment



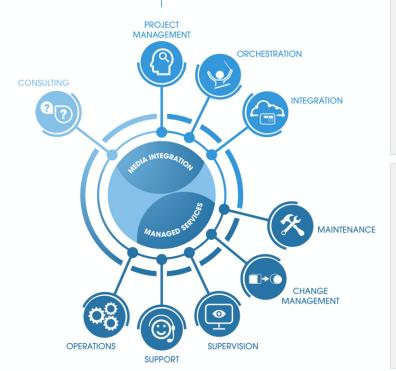
The backbone of any outsourced media supply chain service is its data centre operations. Best practices in the media supply chain involve not only state-of-theart physical infrastructure but also sophisticated software management tools that optimise the delivery of content across various networks.

Globecast utilises top-tier data centres equipped with the latest in technology, coupled with redundant systems and robust disaster recovery protocols, to ensure high availability and resilience.

Moreover, continuous improvement is the cornerstone of our operational philosophy. By consistently maintaining systems and adopting innovative technologies, Globecast ensures infrastructure is not only healthy but also capable of meeting the future demands and growth of the platform.

International presence

From London and Los Angeles to Johannesburg, Beijing and Singapore, Globecast is an international market leader with the ability to support customers wherever they are located. • The value added by Globecast is not just in our technological capabilities but also in our understanding of the broadcast ecosystem. This includes regulatory compliance, rights management and integration with existing broadcaster workflows, which are often overlooked but vital areas in live content delivery.



Our 24/7 infrastructure

 and connectivity
 network includes six
 Globecast and five
 partner
 Teleport/Technical
 Operation Centres
 TOCs, 80 transponders
 on 27 satellites and a
 124,000 Km Fibre
 Backbone with a

A track record in managed services :

100GB core.

Globecast excels in this area by employing advanced monitoring tools and a skilled technical team that can quickly diagnose and rectify issues, often before they impact viewers.

A commitment to accountability

For service providers like Globecast, adhering to strict Key Performance Indicators (KPIs) is essential, including metrics such as issue response times, resolution rates, system uptime and viewer quality of experience. In an industry where viewers may switch services after a single poor experience, maintaining a high level of performance in these areas is critical. That's why KPI capture is key.

Effective issue response and resolution practices are particularly crucial during live events since issues must be addressed in real-time.



Globecast media supply chain processes. case study: Euronews

In 2023, Euronews, a leading multiplatform news provider, selected Globecast as its technical partner to spearhead technologies from several SaaS the transformation of its operations and distribution. Covering content production, playout and distribution of their options. Globecast has also 14 linear channels, Globecast developed an end-to-end solution allowing the news experts to benefit from modern fully integrated, seamless, cloud capabilities, including automating a range of key

Globecast has integrated and now fully manages all these mission-critical linear services 24/7. The solution integrates partners across video editing, scheduling and playout across the company's distribution integrated more specific tools to optimise the service portfolio, leading to the creation of a flexible and easily scalable architecture.

CONCLUSION

Today, Globecast provides outsourced solutions and services at scale for over 1,200 major customers worldwide. This includes connectivity for 2,500 channels, distribution for 7,500 permanent services and 2,700 hours of Video on Demand content per month.

Globecast helps broadcasters and operators navigate the complexities of maintaining traditional and OTT services. By outsourcing broadcast and digital operations, operators can reduce costs, improve service quality and focus on delivering an exceptional viewing experience. With decades of industry experience,

Globecast is your partner in optimising the media supply chain for future growth.

To learn more, visit the Globecast website

https://www.globecast.com/