



DAM 2003 Benchmark study

How people use Digital Asset Management ?

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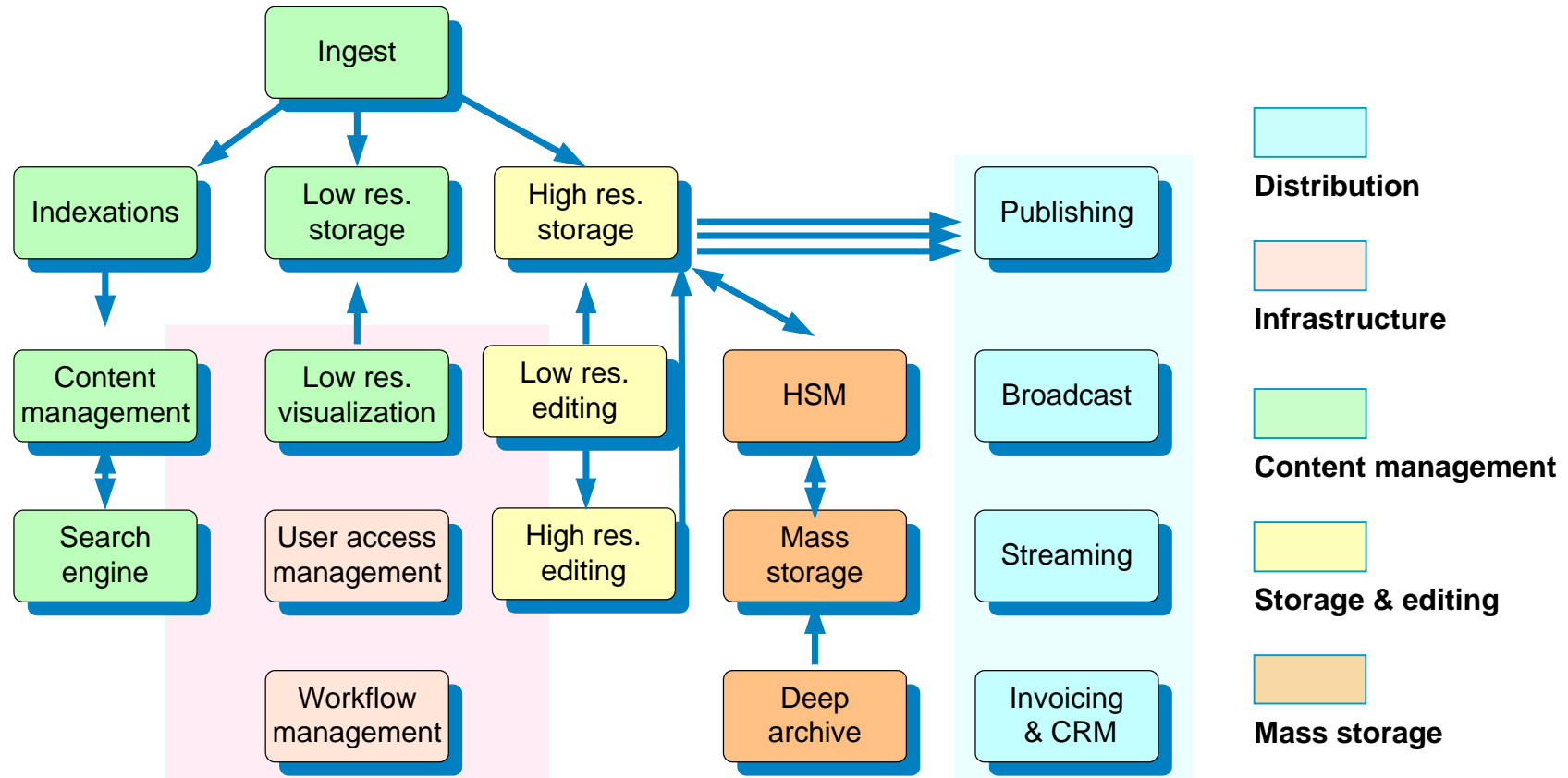
1. Introduction

- Some form of Media or Video Asset Management has been inherent to servers from the beginning in 1995
- Kane has developed a benchmark study: 180 video Digital Asset Management case studies based on references from the major suppliers
 - « Metadata/content management » software editors
 - Ancept, Artesia, Avid, Blue Order, Dalet, Documentum, eMotion, Harris, Generation Technologies, IBM, Omnibus, Question d'Images, SGI, SGT, Sony, TMD, Virage
 - Bulldog, Convera, Ascential, SHS
 - or « Mass storage »
 - Adic-Grau, Ampex, IBM, Sony, Storagetek,
 - Avalon, SGLFlashnet, Front Porch, SGT, SHS, Venacca,
 - EVS, Dell, Grass Valley, Philips, Pinnacle-HP, Seachange, SGI, Sony, EMC2



2. Categories of video DAM projects

- DAM cases cover just some of the 5 possible main segments and 18 possible functions



2. Categories of video DAM projects

- **Diversity of projects:**
 - **different purposes: production, preservation or distribution**
 - **different types of users: TV, service providers, rights owners, producers, national archives, parliaments, marketing departments, advertising agencies**
- **In addition interfaces to legacy systems contribute to the diversity of projects**

2.1. Main categories of video DAM projects inside TV-channels

. Playout centers and news archive for production are most frequent categories

TV-channels projects	Playout centers	News production + archive	Deep archive recovery	Classic programm distribution	Affiliates Distribution	Special programme content mgnt
Ingest						
Indexations						
Content Management data base						
Search Engine						
Low resolution storage						
Browse vizualisation						
High resolution storage						
Craft editing						
Browse editing						
Hierachical Storage Management (HSM)						
Mass storage						
Deep Archive recycling						
Publishing and transfer						
Broadcast/ rundown and studio management						
Web streaming						
Invoicing						
User access and profile management						
Workflow management						

2.2. Main categories of video DAM projects outside TV-channels

- Emergence of digital catalog and post-production applications

Other projects	TV-Producers		Right owners	Lab. & post-house		Internet	
	Special programme server-based production	Sports magazine server-based production	Digital IT distribution	Server-based post-production	Digital repository	Web TV	Newsportal
Ingest							
Indexations							
Content Management data base							
Search Engine							
Low resolution storage							
Browse vizualisation							
High resolution storage							
Craft editing							
Browse editing							
Hierachical Storage Management (HSM)							
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Web streaming							
Invoicing							
User access and profile management							
Workflow management							

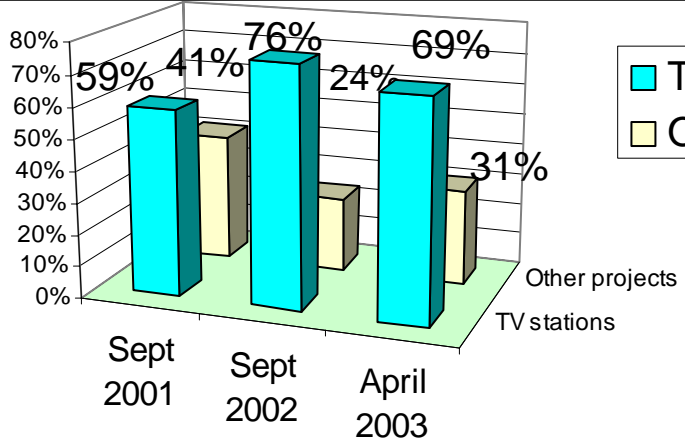
2.2. Main categories of video DAM projects outside TV-channels

- Importance of « government » applications and emergence of corporate applications

Other projects	Agencies	Radio	National archive	Parliament	Court	Defence	Malls & LBE
	News Distribution	Archive and digital distribution	Preservation and digital distribution	Film & archive	Film & archive	News intelligence app.	Playout centers
Ingest							
Indexations							
Content Management data base							
Search Engine							
Low resolution storage							
Browse vizualisation							
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Web streaming							
Invoicing							
User access and profile management							
Workflow management							

2.2. Main categories of video DAM projects outside TV-channels

- TV playout centers and DAM for news are the most frequent DAM projects
- Video DAM projects are still more numerous for TV than for other sectors in numbers
- But the proportion TV projects/non TV projects is decreasing in 2002/2003 after having increased in 2001














Project	Sept 2001	Sept 2002	April 2003
TV stations	59%	76%	69%
Other projects	41%	24%	31%
No cases	64	144	180

- Some « non TV-channel » projects are huge in terms of budget

3. Different strategies among broadcasters

- For playout centers: general acceptance of IT data storage on MPEG2 long gop
 - Typical Phasing:
 - Step 1: data library implementation and server playout with legacy systems (traffic, content, stock, rights) staying the same
 - Step 2 : legacy system reengineering and introduction of browse, indexation, new search i.e. *real content management*
- For DAM news production projects there are still 3 strategies: shelves (wait), near-on line or data-library.

1. Wait	2. Near on line	3. Digital Library+Content Mngnt	
		Big bang	Step by step
  + all the others ...	  Sony Newsbase ...	   CentreTV KomoTV KGMTV ...	    ...
















- For DAM projects for producers and rights owners: 50 Mbit/s/intra high definition format is still a network and economical barrier

4. Return on Investment issues?

- ROI depends on project type:
 - For playout centers data technology as opposed to tapes is cheaper for more than 4 channels concurrent transmission. ROI can be achieved in as little as 1 year.
 - For newsroom production, most of the savings (30% of costs) can be obtained through a simple server-based newsroom solution and production re-organisation, without a real DAM project
 - Automation
 - Multiskilling newsroom (journalist editing)
 - 1 man or 2 man ENG crew re-organisation
 - Reduction of transport time (network, journalist location, ...)
 - DAM is an editorial issue: credibility of news.
 - For producers and post-producers, the issue is to speed up production and to be ready to air in less time, with a positive impact on the cost of production.

4. Return on Investment issues?

- Most of broadcasters justify servers and DAM investments by increasing the number of channels, and by increasing the number of hours produced with constant staff or minimum additional staff
- **Very important strategic or editorial gains:** ability to broadcast new channels quickly, new ways of telling stories (graphics), new style (DV camera), new format (interactive TV), higher reactivity, better credibility (archive) ...

	Staff reduction More Production	Staff reduction constant Production	Constant staff More Production	More staff More Production
		  	 	
Staff	-13%	-16% -32% -1%		+2%
Production	+ Bulletin in French		+17%	+25%
			    	

5. How DAM affects people and job content?

- Multiskilling for editorial/content jobs
- Fewer traditional technicians as a consequence of changes to the production and broadcast processes, **but more IT jobs**
- Content/creative department accountable for costs and organization issues
 - New profile for managers (not less creative but more business process reengineering oriented)
 - And new middle-management jobs with mixed competencies (editorial and technical)
- Leaner organization: no more assistants?
 - « TV groups wish to exchange a bunch of assistants against a bunch of new channels? »

Conclusion: towards a mature market

- Important evolution toward a mature DAM market

First generation: 1999-2002	Second generation: starting in 2003
Bespoke data model and pilot projects	Stabilised but at the same time multi-purpose data models
Long term implementation	Standard parametrisation for each kind of project, reducing implementation time
Expensive projects + high entry level	A certain downsizing of product prices
A lot of e-commerce projects abandoned	Emergence of « ERP-like » products, and higher level of integration among functions (less integration problems)
Emergence of playout centers and news production as recurring projects	Workflow capabilities for reorganisation
Falling investment in the TV sector, and a lot of companies going bankrupt	A lot of non-TV projects assuring viability of the market
Technical departments' resistance to high costs and long implementation lead times	Convergence of IT and technical departments