



恭喜发财

*May the gods of Health,
Wealth & Happiness
smile on you always.*

*Happy Year
of the Rat!*

Thailand, China strengthen ties in BEC, Tencent deal Ch3 originals on WeTV, Ch3+, Tencent Video

Thailand's BEC World and Chinese streamer, Tencent-owned WeTV, have tied up to distribute Thai drama in Thailand and on Tencent Video in China. The new deal is part of WeTV's aggressive growth ambitions and follows strong take up of BEC's dramas across the region in 2019.

The full story is on page 3

Whitehead exits in ViacomCBS reorg Asia rolls into Europe, ME, Africa under Raffaele Anecchino



Mark Whitehead

Veteran Asia pay-TV head, Mark Whitehead, is exiting ViacomCBS' Singapore-based regional networks operation at the end of this month in a wide-ranging re-org announced out of New York and London today.

ViacomCBS Networks International's Asia footprint will be managed by Raffaele Anecchino, currently president of the division's operations across Southern and Western Europe, the Middle East and Africa. Anecchino's new remit also includes Northern/Eastern Europe.

His new title is president, ViacomCBS Networks Europe, Middle East, Africa and Asia (EMEA).

Maria Kyriacou, most recently ITV Studios' international president, will lead

Australia and New Zealand.

Kyriacou joins the newly expanded division on 3 February as president, ViacomCBS Networks U.K. and Australia, which includes responsibility for Ireland, New Zealand and Israel.

Her role includes oversight of ViacomCBS's free-to-air broadcast networks, Channel 5 in the U.K. and Network 10 in Australia,

Network 10 CEO, Paul Anderson, additionally becomes EVP, ViacomCBS Networks Australia and New Zealand with immediate effect, reporting to Kyriacou.

No announcements have been made on India, a joint venture which will be managed by the U.S. corporate office.

The rest of the story is on page 5

A HOOQ ORIGINAL PRODUCTION

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BEC World, Tencent Video strengthen content ties

BEC/Ch3 original drama to stream on WeTV Thailand, Ch3+ and Tencent Video

Thai media outfit BEC World and mainland Chinese streaming platform, Tencent-owned WeTV, have tied up to distribute long-form Thai drama in Thailand and on Tencent Video in China in 2020.

The new deal is part of WeTV's aggressive audience-growth ambitions in Thailand for this year and follows strong take up of BEC World's dramas across the region in 2019.

WeTV Thailand country manager, Kanokporn Prachayaset, said the target was a 400% increase in consumption for Thai drama on the platform in Thailand by the end of the year.

The Tencent Video/WeTV agreement, announced in Bangkok on Monday (13 Feb), involves an undisclosed number of titles commissioned/produced by BEC World's terrestrial broadcast station, Thai TV Ch3.

Financial terms of the deal have not been disclosed.

Ch3's 2020 drama line-up will be available on WeTV Thailand from this month, two hours after the terrestrial broadcast. The shows will also stream on BEC World's newly rebranded Ch3+ streaming app.

The list of exclusive titles for Tencent Video – including series that will simulcast in Thailand and China – is still being finalised.

Company bosses said the new alliance is their response "to strong demand from online audiences across both Thailand and China for Ch3 drama content".

BECi's managing director, Warut Leeruangsakul, says the company's own streaming service, Ch3+, will continue to air Ch3 drama.

But, he adds, "as the leader in Thai drama content, we must be where our audiences are at".

"While Ch3+ will continue to serve as our own platform to engage our core user base, we should also be platform



Ariya Banomyong, President, BEC World; Jeff Han, SVP, Tencent Penguin Pictures

agnostic to reach our full audience potential," he says.

He adds that WeTV's base is growing in Thailand, and that the streamer is an "important OTT partner to achieve this goal".

WeTV launched in Thailand in 2019 with a slate from Tencent Penguin Pictures, including *The Untamed*, and about 200 Chinese series.

WeTV Thailand's country manager, Kanokporn Prachayaset, says the expansion beyond Chinese content in Thailand has only just started.

"We will continue to introduce local content from our leading local partners to fulfil our users' needs," she says.

BEC World drama has already chalked up audience successes in China.

The debut simulcast – *The Crown Princess* – on Tencent Video, has been viewed more than 280 million times and ranks in the top five list of most-viewed Thai content on the platform, according to BEC's chief commercial officer, Ron Kamnuanthip.

Tencent Video has about 550 million monthly active users. WeTV engagement

has not been confirmed.

The new alliance also includes rights to Ch3 drama for WeTV territories in other parts of Asia. Details are not immediately available.

BEC World's expanded China footprint comes on top of the best year in memory for Thai content licensing around the region.

Deals brokered by licensing partner, JKN Global Media, include the first Thai drama to air on free-to-air terrestrial television in Malaysia, as well as the first Thai dramas licensed for free-TV in Indonesia in a deal with Rajawali TV (RTV).

In another deal sealed by JKN late last year, Korean channels operator TRA Media picked up rights to eight Thai drama titles for its two cable channels – Smile Plus (entertainment) and TVA Plus (Asian drama channel). The agreement marked BEC World's debut in the Korean market.

JKN Global Media reported a 127% increase in revenue from international sales of programme rights for the first nine months of 2019, driven largely by its BEC World licensing arrangement.

Asia-Pac pay-TV revenue at \$66b by 2024

Grim forecast for growth outside of China and India

Asia-Pac pay-TV revenue could hit US\$66 billion by 2024, according to Media Partners Asia's (MPA) latest report, published on Monday (13 January).

Asia Pacific Pay-TV Distribution 2020 shows China at US\$27 billion of the 2024 total, logging growth of 3% (CAGR) over the five years.

India will lead the region's growth until 2024, at 6% (CAGR), to take US\$15 billion of the total. South Korea is third at US\$8.3 billion followed by Japan at US\$7 billion.

US\$15 billion goes to India, with Korea at US\$8.3 billion (3% growth) and Japan at US\$7 billion (1% growth) for a total of US\$57 billion for these four markets.

MPA puts India in the growth lead with 6% growth a year (CAGR) between 2019 and 2020. India will also contribute almost half of net subscriber additions in Asia Pacific over the next five years.

Total Asia-Pacific pay-TV industry revenue (subscription fees, local/regional ad sales), grew 6% to US\$57 billion in 2019.

Excluding China and India, total Asia-Pacific pay-TV revenue grew only 1.3% in 2019 to US\$23 billion. By 2024, 1.1% growth to US\$25 billion is projected.

The total Asia-Pacific pay-TV subs base grew 2% in 2019 to reach 630 million, representing 62% penetration of total TV homes (adjusted for multiple subscriptions in a home).

By 2024, total Asia Pacific pay-TV subs is expected to grow to 663 million, representing 63% penetration (adjusted for multiple subscriptions).

Outside of China and India, pay-TV subs in Asia Pacific are expected to grow 1.3% (CAGR) between 2019-2024.

In 2019, Asia Pacific, including China and India, added 12.8 million net new subs. India contributed 47% of the increase, and China 37%.

Excluding China and India, net adds were two million in 2019. 42% of those came from Korea, driven by telco IPTV.

Close encounters

Asia's pay-TV industry takes cover, braces for tough 2020

Asia's pay-TV industry is bracing for another tough year.

Even the brighter spots like India are blighted by the uncertain impact of recent regulations, and uncertainty hangs dark and low as international giants adjust their commitment to their linear services in favour of shiny new direct-to-consumer options.

Our prediction is more tough conversations as traditional platform partners and programmers work out a way forward – or not – juggling costs, content rights and relationships in a gyrating landscape.

So far, there's no confirmation of region-wide rollouts of Disney+ or HBO Max or Peacock or even Disney's India platform Hotstar. So those are among the unknowns at the dawn of the Year of the Rat.

Meanwhile, we're counting the fallout of changed priorities in the region, and watching out for the next wave of streamlining. This will wash over an industry that has been in attempted-reinvention mode for the past two years.

In the latest change, Sony Pictures Television has offloaded its Asia networks (excluding the lucrative India biz), selling for an undisclosed amount to a new entity set up by veteran Sony execs Andy Kaplan and George Chien.

Both Kaplan and Chien know exactly what's under the hood here, so we're taking the view that the acquisition is a vote of confidence in linear pay-TV services and that there is a business there. It's just not the kind of business that U.S. studios like Sony find compelling anymore.

Sony's appetite for the linear networks business in Asia has been under an industry microscope for months – even before it shuttered the 12-year-old English-language general entertainment service, Sony Channel in May 2019 – as part of the scrutiny of U.S. studios' commitment to linear channels in the region.

NBCUni was under the same microscope. On 31 Dec 2019, the plug was pulled on the last of its entertainment channels – E! and Diva. This follows the

exit of Syfy and Universal Channel in June 2017, leaving the network with DreamWorks for kids and biz network CNBC.

At about the same time, CBS and RTL pulled the plug on their four-year-old channels JV, offloading two regional networks – RTL CBS Entertainment and Extreme – to Canada's Blue Ant Media.

As part of an industry-wide shift away from large bundles towards a focus on higher-performing channels and key brands, Turner (pre-WarnerMedia) also took an axe to its linear bundle, shuttering Turner Classic Movies (TCM) and truTV HD across Southeast Asia and Hong Kong from January 2019.

Discovery has also axed channels in favour of a tighter focus on fewer services. In the past few years, Discovery Kids linear has gone, along with Setanta sports network and Eve, the network's short-lived effort to target female audiences.

As 2020 moves into week three, the industry remains on high alert for more changes at Fox Networks Group (FNG) under Disney. So far, FNG has pulled the plug on three on-demand play channels – Fox Sports Asia, Star Chinese Movies Play and Fox Movies Play. Those went in June 2018. FNG also closed Nat Geo Music and disappeared Channel [V], an early victim of changing times and consumer habits.

Where does original content creation stand in all this? Depends. Our bet is that big-brand originals like *Asia's Got Talent* for Sony's AXN will take a while to return to pay-TV, if they ever do. HBO Asia will continue to drive originals and investments in other companies' projects. Netflix will continue to spend, but more selectively and maybe not so much in Southeast Asia/Taiwan until they figure out how not to repeat their mis-steps, but definitely in India and Japan. Ditto on India and Japan at Amazon. Viu is all systems go, now that it has amputated the India unit. If there is local production by pay-TV programmers, our bet is that it will be led by sponsored projects with heavy product placement that have paid for themselves before they are greenlit. Sigh.

Indonesia's Antv debuts Putri Mahkota Philippines' ABS-CBN breaks new ground with scripted format



Putri Mahkota

Indonesian free-TV network Antv premiered its remake Philippines' TV scripted series, *The Heiress*, this month.

The Indonesian adaptation, *Putri Mahkota*, airs daily on the terrestrial schedule at 7.30pm.

The series is Antv's first foray into scripted adaptations from the Philippines, and comes as Asian programmers increase their content exposure to neighbouring markets.

The Heiress is about two women fighting over family wealth in a story laden with afternoon drama – love, rivalry, abuse, dark and painful secrets, and high-emotion encounters.

Patrick Lim joins CJ ENM

Patrick Lim has joined the regional programming operation of Korea's CJ ENM as senior manager, brand partnerships. Lim was previously in a marketing role at NBCUniversal, also in Singapore. Before NBCUni he worked for Singtel and Mediacorp.

Paul Anderson to lead ViacomCBS Aus/NZ Combined ops "will add value," int'l boss David Lynn says

ViacomCBS Inc has appointed Network 10 chief executive, Paul Anderson, to lead its combined operations in Australia and New Zealand.

Anderson will additionally become executive vice president, ViacomCBS Networks Australia and New Zealand, with immediate effect.

His appointment follows the merger of Viacom and CBS Corporation.

Network 10, which has been part of CBS Studios International since November 2017, has been integrated into ViacomCBS Networks International and will now be combined with Viacom's existing operations in Australia and New Zealand under Anderson's leadership.

In his expanded role, Anderson will ad-

ditionally have local oversight of Viacom's family of flagship pay TV networks – including Comedy Central, MTV, Nickelodeon and Nick Jr. – and a range of associated businesses, as well as retaining oversight of Network 10's portfolio of free-to-air TV networks and digital platforms.

Ben Richardson, general manager of Viacom's existing networks operations in Australia and New Zealand, will report to Anderson as GM, SVP, ViacomCBS Pay Networks and Network 10 Business Development.

David Lynn, CEO, ViacomCBS Networks International, said today that "operating our combined free-to-air, pay TV and digital assets as a single portfolio will add value to our business in Australia".

From page 1: ViacomCBS

Unveiling its "new simplified management structure designed to maximise growth", ViacomCBS Networks International said the reorg streamlines ViacomCBS networks into two brand groups and three pan-regional management hubs, reporting to David Lynn, president/CEO, ViacomCBS Networks International (VCNI).

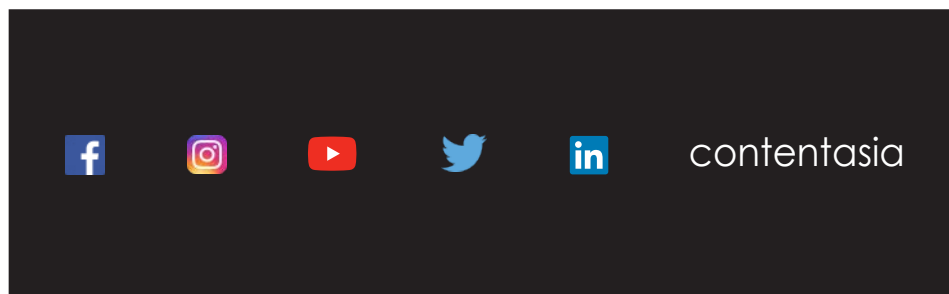
Kerry Taylor, currently EVP, MTV International and CMO VCNI U.K., has been promoted to EVP of VCNI Entertainment & Youth Brands, reporting to Lynn and Chris McCarthy, president, entertainment and youth brands, ViacomCBS Domestic Media Networks.

Taylor's remit includes international oversight of MTV, Comedy Central, Paramount Network and BET.

Jules Borkent has been promoted to EVP, VCNI kids and family, reporting to Lynn and Brian Robbins, ViacomCBS Domestic Media Networks' kids and family entertainment president. Borkent has been with Nickelodeon since 2001.

"Consolidating our international flagship brands into two groups will simplify our structure and more closely align our business with ViacomCBS' U.S. brands, enabling us to share more content and resources across our different brands and extract maximum value from our content investment and libraries," Lynn said in today's announcement.

Whitehead joined Viacom International Media Networks in mid 2014. His most recent role was president and managing director of VCNI Asia Pacific.





Repercussion

Repercussion is a Thai period drama about a Thai-Chinese family full of volcanic troubling issues. The bustling sea of love, greed, revenge and power struggles are stirred from inside out and outside in. The setting begins in 1967 at Chumsaeng Market, Nakornsawan province, Thailand. The story is led by Yoi, a store owner, a mother of four grown-up children and the mastermind behind all these conflicts who felt that the only way to her family's success and happiness is through her planning and controlling of everyone's life. Length: 19x105 mins
JKN Global Media 45/14 Moo1 Songkanong, Sam Phran District, Nakhon Pathom 73210, Thailand T: +66 3431 0569



Big Cat Country

Real Drama. Real stories. *Big Cat Country* is the ultimate lion saga. In the heart of Zambia's Luangwa Valley, three lion prides collide. Each is determined to fulfill its destiny – one to maintain power, another to conquer and a third to save itself from collapse. A wildlife camera team gets caught up in the action as they follow the lions day and night through every twist and turn of fortune. Length: 6x60 mins 4K+HDR **Blue Ant International** 200-130 Merton Street, Toronto, Ontario M4S 1A4, Canada T: +1 416 646 4434

On Becoming A God In Central Florida

Set in a small Orlando-adjacent town in 1992, the dark comedy series follows Krystal Stubbs (Kirsten Dunst), a minimum-wage water park employee who lies, schemes and cons her way up the ranks of Founders American Merchandise (FAM) — the cultish, flag-waving, multibillion-dollar pyramid scheme that drove her to ruin in the first place. Determined to make a better life for herself, Krystal dives deep into FAM until her business begins to affect those closest to her. Length: 10x60 mins **Sony Pictures Television** 2/F Cityplaza Three, 14 Taikoo Wan Road, Taikoo Shing, Hong Kong T: +852 2913 3788



10 Years Younger

10 Years Younger is the transformative show that has worked its magic across the globe. A team of experts take on the ultimate challenge – to turn back the clock, making them feel and look younger both inside and out. Using the very latest beauty treatments, this wonderfully flexible and inventive show can be adapted to suit any market or budget. Every episode builds towards a heart-warming reveal and is packed with tips and beauty knowledge, giving everyone the confidence to look 10 Years Younger. Length: 60 mins [Format] **all3media** 1 George Street, #10-01, Singapore 049145 T: +65 6817 3780



Backstreet Rookie

30-something Dae-hyun runs a small convenience store in his neighborhood. When his only part-time cashier quits, he has to find a replacement. In walks college co-ed Saetbyul. Dae-hyun breathes a sigh of relief and he hires the beautiful but tough-as-nails Saetbyul on the spot. But Dae-hyun soon begins to realise that he and Saetbyul are not complete strangers. In fact, they shared an impulsively romantic moment in the past – a moment he will never forget. Length: 16 x 60 mins **A+E Networks** 80 Bendemeer Road, #07-04 Hyflux Innovation Centre, Singapore 339949 W: sales.aenetworks.com E: intl.sales@aenetworks.com

Ruthless City

Seher was living with her two daughters, son and her mother in law in Antakya, a small city south east of Turkey. Her family's life changes dramatically when her mother in law makes a deal to sell one of her daughters to a wealthy man from her hometown, Agah Karaçay, who has a beautiful wife and two children. This arrangement is a test for every person in both families and threatens to uncover an old and dangerous secret. Length: S1 is 9x140 mins / 30x45 mins (S2 in production) **Kanal D International** YELDA HABER VE GORSEL YAYINCILIK A.S., Demiren Medya Center 100. Yil Mah. 2264. Sk. No:1, 34204 Bagcilar, Istanbul, Turkey T: +90 212 413 56 66

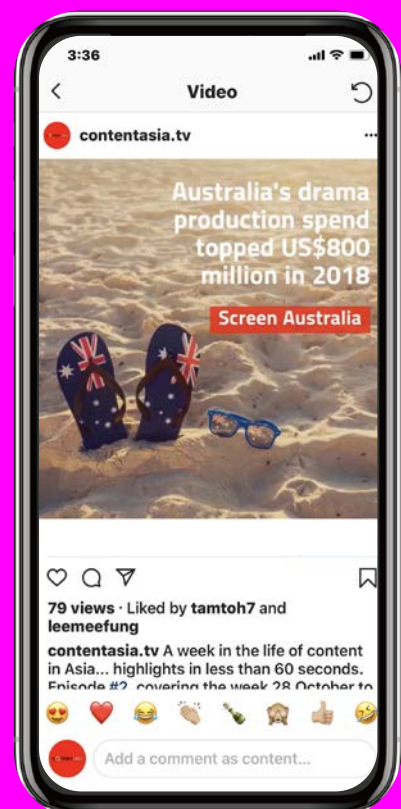
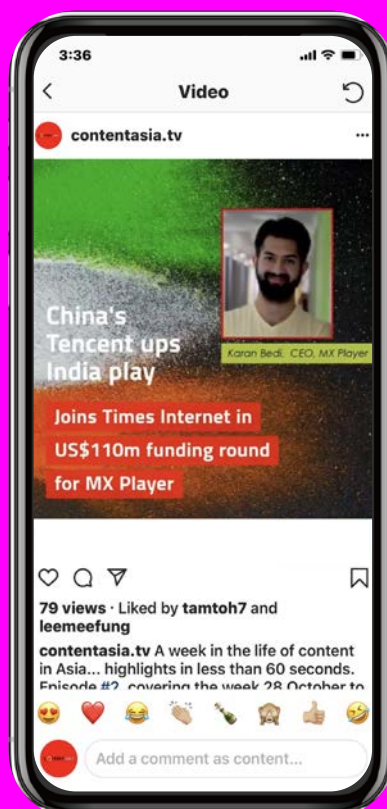
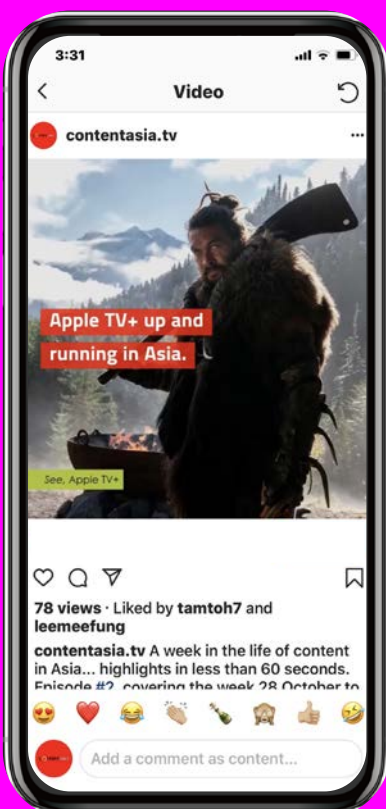


What a Week

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India

In numbers

Population.....	1.339 billion
Households.....	298 million
TV households.....	197 million
TV penetration.....	66%
Pay cable TV subs.....	98.5 million
Pay DTH TV subs.....	69.30 million
Pay HITS TV subs.....	1.5 million
Active DTH subs.....	54.26 million
Pay TV channels.....	330
- HD channels.....	98
- SD channels.....	232
Registered satellite TV channels.....	910
Registered MSOs.....	1606
DTH operators.....	4
Mobile phone subs.....	1.173.75 million
Internet subs.....	687.62 million
Broadband subs.....	625.42 million

Source: World Bank (population), Telecom Regulatory Authority of India (TRAI, mobile, broadband, TV channels, DTH), BARC India (households, TV households)



Guddan Tumse Na Ho Payega, Zee Entertainment Enterprises Limited (ZEEL)

Terrestrial/Free TV

Doordarshan

Established in 1959, Doordarshan (DD) is India's government-funded national broadcaster, transmitting to 90% of the population via 1,412 terrestrial transmitters. DD also operates the DTH DD Free Dish satellite service (launched 2004), offering both TV and radio channels. DD is overseen by public broadcast corporation, Prasar Bharati, an autonomous body that also looks after All India Radio (AIR).

Multi-channel Programmers

Discovery Communications

Launched in 1995, Discovery Communications reworked its model for India in 2017, emerging with, among other initiatives, the male youth-focused general entertainment channel Jeet and a bundle of online verticals. The company operates 12 channels in India, including the flagship Discovery Channel.

NDTV

New Delhi Television (NDTV) distributes

three NDTV-branded services: NDTV 24x7 (English-language news), NDTV India (Hindi news) and NDTV Prime (male-targeted infotainment).

Sony Pictures Networks India

Sony Pictures Networks India (SPN), a subsidiary of Sony Corporation, operates a slew of channels, including Max/HD (Hindi movies, special events), Max 2 (Hindi movies), SAB/HD (family comedy), Pix/HD (English-language movies), AXN/HD (English-language entertainment), and sports Sony Six/HD. SPN reaches over 700 million viewers in India.

Star India

Star India broadcasts more than 60 channels in eight languages, reaching 9 out of 10 C&S TV homes in India. Genres range from GEC, movies, kids to sports and lifestyle, including its flagship Star Plus.

Sun TV Network

Sun TV Network operates 33 satellite TV channels (including four HD channels) in four languages (Tamil, Telugu, Kannada, Malayalam) serving more than 95 million households in India. The channels are also available in 27 countries, including Singapore, Malaysia and Sri Lanka.

Times Network

Times Network, the television arm of Bennett, Coleman & Co Ltd (BCCL) aka The Times Group, distributes Times Now (English-language news), ET Now (stock/business news), Mirror Now (English general news), Movies Now/HD, MN+ (Hollywood movies), Romedy Now/HD (English-language entertainment), MNX/HD (Hollywood entertainment) and Zoom (Bollywood general entertainment).

Viacom18

Viacom18 is a 49/51 joint venture in India between Viacom Inc and TV18, distributing a portfolio of entertainment channels, including Colors (Hindi general entertainment), Rishtey (general entertainment), MTV (youth/music/lifestyle), Sonic (kids), Nick Jr (kids), Colors Infinity (English entertainment), VH1 (int'l entertainment) and Comedy Central (English-language comedy). Viacom18 also operates Viacom18 Motion Pictures and runs Viacom's consumer products business in India.

Zee Entertainment (ZEEL)

Zee Entertainment Enterprises Limited (ZEEL) owns more than 260,000 hours of television content and rights to more than 4,800 Hindi movie titles. Brands include Hindi GECs Zee TV/HD, &TV/HD,

Zing and Big Magic; regional entertainment Zee Marathi/HD, Zee Talkies/HD, Zee Yuva, Zee Bangla/HD and Zee Bangla Cinema; movies Zee Cinema/HD, Zee Action, Zee Classic and & pictures/HD; and niche channels Zee Cafe/HD, Zee Studio/HD, Zee ETC and & prive HD. Zee claims a reach of more than 1.3 billion viewers across 173 countries.

Direct To Home (DTH) Satellite

Airtel Digital TV

Global telecommunications provider Bharti Airtel launched direct-to-home (DTH) satellite TV platform, Airtel Digital TV, in Oct 2008. The DTH service offers 694 channels and services, including 78 HD channels, 5 international channels and 3 interactive services to over 15 million subs (Aug 2019).

d2h/Dish TV/Zing

The amalgamation of Videocon d2h and Dish TV completed in Dec 2017 and took effect in March 2018. Post merger, DTH services d2h and Dish TV continue to be offered as separate products. The combined entity, Dish TV India Limited, carries more than 701 channels and services, including 31 audio channels and 71 HD channels/services to a total net subscribers of 23.9 million (Sept 2019). Dish TV launched Zing Digital in Jan 2015 to provide regional language DTH services for Tamil viewers in the states of Kerala, West Bengal and Odisha.

DD Free Dish

State-owned broadcaster, Doordarshan (DD), launched free-TV DTH service, DD Free Dish (formerly DD Direct Plus), in Dec 2004 with 33 channels. The Ku-band platform now offers 80+ TV channels and about 40 radio channels. DD Free Dish transmits to about 20 million subscribers, and is available nationwide (excl Andaman/Nicobar Islands).

Sun Direct TV

Established in Dec 2007 as an 80:20 joint venture between India's Maran Group and Malaysia's Astro Group, Sun Direct TV offers more than 200 channels in multiple

Indian languages (Tamil, Telugu, Malayalam, Kannada). Monthly subscription packages cost from Rs129.66/US\$1.80 a month for the My FTA pack (157channels) to Rs329.66/US\$4.60 a month for the ROI DPO Pack 3 (266 channels).

Tata Sky

Launched in Aug 2006 as a joint-venture between Tata Sons and TFCF Corporation (formerly 21st Century Fox), Tata Sky offers upward of 500 TV channels and services to about 18 million users across more than 20,000 towns. Monthly subscription fees for Tata's curated packs range from Rs45.08/US\$0.60 for the Malayalam Metro plan (6 SD channels) to Rs772.41/US\$11 for the Tamil Telugu Premium Sports English HD package (67 HD and 91 SD). Tata also operates mobile service Tata Sky Mobile, offering up to 400 live TV channels and 5,000 VOD content.

Multi-system Cable Operators

Asianet Digital

Established in 1993, Asianet Satellite Communications is a provider of digital cable TV and broadband internet services in Kerala, Karnataka, Andhra Pradesh and Telangana. Asianet Satellite's cable TV subsidiary, Asianet Digital, offers about 270 SD and 60 HD channels. Asianet Digital had 1.48 million active subscribers in Sept 2019. Asianet also operates an OTT service, Asianet Mobile TV, accessible worldwide from US\$30/six months or US\$50/year for about 100 live TV channels and 20 radio channels. In India, the OTT service costs Rs499/US\$7 for six months or Rs899/US\$12.70 a year.

Den Networks

Established in July 2007, Den Networks is a cable TV/fixed line broadband service provider with a reach of about 4.3 million active subs in 500+ cities across 13 states (Sept 2019). Den Networks' monthly plans start from Rs149/US\$2 to Rs385/US\$5.40 for the Okhla Delhi packs.

Fastway Transmissions

Fastway Transmissions Pvt Ltd was founded in 2008 in association with Digicable

Network India Pvt Ltd with a vision to bring a paradigm shift in India's cable TV distribution industry through digitalisation and by providing value added services. The platform serves over four million subscribers in 200+cities via 12,000km of underground and 10,000km FTTH networks.

GPL Hathway

GPL commenced in 2006 in Gujarat offering CATV services and now expanded to 750+ towns across 11 states in India, providing both CATV and broadband services. GPL had 7.75 million active CATV subs, of which 7.25 million paying subs (Sept 2019) and 355,000 active broadband subs, of which 75k FTTH subs. GPL distributes 650+ channels, including 79 HD and 36 in-house across India.

Hathway Digital

Established in 1995, Hathway Cable & Datacom is a digital cable TV and broadband service provider. The platform has six million cable TV subscribers, of which 290,000 are HD subs (Sept 2019) across 350+ cities and major towns. Subscriptions cost from Rs130/US\$1.80 a month for the Maharashtra FTA pack (100 channels) to Rs669/US\$9.40 a month for the English Diamond HD tier (209 channels). Hathway owns and operates 15 in-house channels. The platform also has 860,000 broadband subscribers and claims 5.5 million broadband homes passed in 26 cities (Sept 2019).

InDigital

Established in 1995, IndusInd Media and Communications Limited (IMCL), backed by Hinduja Ventures, carries about 700 TV channels to about five million subscribers in India. Monthly subscription costs from Rs130/US\$1.80 for 141+ free-to-air TV channels. Ala carte channels cost from Rs0.25/US\$0.003 a month to Rs19/US\$0.27 a month.

Siti Networks

Essel Group's multi system operator, Siti Networks Limited (formerly Siti Cable Network Limited/Wire and Wireless India), operates 10 digital head ends and a network of more than 33,000km of optical fibre and coaxial cable in India. Monthly subscriptions rates range from Rs152.87/US\$2.15 for 140 TV channels to

Rs459/US\$6.50 for 249 TV channels. Siti's broadband costs from Rs599/US\$8.40 a month for an unlimited 20-Mbps internet connection to Rs9,900/US\$139 for 18 months (unlimited 50-Mbps plan). The network had 9.123 million active digital subscribers in Sept 2019.

Tamil Nadu Arasu Cable TV

State-owned Tamil Nadu Arasu Cable TV (TACTV) was incorporated in 2007 (as Arasu Cable TV) to provide affordable cable TV services. The platform had 2.77 million active subs in Sept 2019.

Channel Distributors

IndiaCast Media Distribution

IndiaCast, owned by TV18 & Viacom18, manages subscription and placement services for 68+ channels, including 17+ HD channels spanning general entertainment, kids, news, music, infotainment and movies.

Online/mobile/OTT

AltBalaji

India-based global direct-to-consumer subscription VOD platform, AltBalaji, launched in April 2017 offering original Indian content in multiple local languages. AltBalaji, which reported upwards of 21.3 million paying users across 90 countries (Mar 2019), is operated by Alt Digital Media Entertainment, a wholly owned subsidiary of production powerhouse, Balaji Telefilms Ltd.

Airtel Xstream

Launched in Sept 2019, Airtel Xstream, is a revamped version of the former Airtel TV. The Android TV box offers DTH/IPTV Airtel subscribers live streaming of 400+ TV channels and 10,000+ VOD movies/TV titles, as well as third-party OTT services such as Zee5, Eros Now, Netflix and HungamaPlay. The service comes in three options, via the Airtel Xstream Stick, a plug and play device for TV sets; a set-top box; and via app/web access. The stick/STB costs Rs3,999/US\$56 each with a complimentary one year subscription worth Rs999/US\$14 for new subscribers. Airtel Digital TV subscribers pay Rs2,249/US\$32.

Amazon Prime Video India

Amazon rolled out online shopping service Amazon Prime in 100 cities in India in July 2016 and added video streaming service Prime Video in Dec 2016 at no extra cost. Prime Video now offers content across six Indian languages – Hindi, Tamil, Telugu, Bengali, Marathi and Kannada. The offering also includes original shows such as *The Forgotten Army - Azaadi Ke Liye* (Jan 2020), a five-part docu that chronicles the dynamic story of Lieutenant Sodhi and his army of heroic men and women fighting for Indian Independence during World War II. Amazon Prime membership costs Rs129/US\$1.85 a month or Rs999/US\$15 a year. Available standalone and via Airtel Broadband and BSNL.

Bigflix

Reliance Entertainment's VOD platform, Bigflix, offers 2,000+ movies in nine regional languages (Hindi, Telugu, Tamil, Punjabi, Malayalam, Gujarati, Marathi, Bhojpuri, Bengali). Bigflix costs from Rs50/US\$0.70 a month or Rs500/US\$7 a year for up to five connected devices. Select movies are offered for rent (without subscription) at Rs80/US\$1.15 a title accessible for two days.

DailyHunt

DailyHunt is India's news and local language content application, offering live TV (partners include YuppTV, Republic TV, BBC News, ABP News), VOD (partners include OneIndia, News X, Viu) and news articles. The Dailyhunt group claims 90+ million users spending over 3.7 billion minutes on the service every month. Investors include Matrix Partners India, Sequoia Capital India, Omidyar Network, Falcon Edge and Bytedance. The platform, which launched as Newshunt in 2009 and sold to Verse in 2012, rebranded as Dailyhunt in August 2015.

Den TV+

Cable TV provider Den Networks launched Den TV+, a mobile TV app extension of Den TV, in Feb 2017. Den TV+ offers 130 live channels, 2,500 movies and 10,000 hours of VOD content in Hindi, English and Indian regional languages. The service is offered for free to Den's TV and broadband subscribers.

Eros Now

Bollywood production house Eros International's Eros Now offers 12,000+ Hindi, Tamil and regional language films/TV content to 18.8 million paying subscribers and 154.7 million registered users worldwide (Sept 2019). Premium plans cost Rs99/US\$1.40 a month or Rs950/US\$13.60 a year unlimited access to all content.

Hoichoi

Launched in 2017 by SVF Entertainment, global streaming service Hoichoi is home to Bengali content. The offering includes 50+ hours of original web series/films and over 500 acquired movies on demand as well as Bengali songs. Subscription costs Rs399/US\$5.60 a year. SVF also has interests in film/TV production, film distribution, music and cinemas.

Hooq

Hooq, established in Jan 2015 by Singapore telco Singtel, Sony Pictures Television and Warner Bros, launched in India in June 2015. Priced at Rs89/US\$1.25 a month or Rs450/US\$6.30 a year and bundled with Airtel's Xstream plan at Rp249/US\$3.50 a month. Carrier billing agreements with Vodafone and Idea.

Hotstar

Novi Digital Entertainment, a subsidiary of Star India, launched ad-based/SVOD platform Hotstar in Feb 2015. The platform offers 100,000+ hours of drama/movies in multiple languages and major sports properties. Premium subscription costs Rs299/US\$4.30 a month or Rs999/US\$14.40 a year. Select content is offered for free.

Hungama Play

Hungama Digital Entertainment Media launched Hungama Play in July 2015 offering 5,000 movie titles and 1,500 hours of TV shows in multiple local languages. Hungama Play also carries original series, including youth comedy *Boys with Toys*; *Bar Code*, about two night club owners; and psycho thriller *Damaged*.

JioTV/JioCinema

Reliance Jio Infocomm launched live TV streaming platform JioTV and VOD service JioCinema in Sept 2016 exclusively for its mobile Jio subscribers. JioTV offers upwards of 575 live TV channels, including

60+ HD channels and JioCinema carries over 100,000 hours of on-demand content). Reliance Jio reported more than 280 million Jio subscribers in Dec 2018.

Lattu Kids

Launched in 2016, edutainment platform Lattu Kids offers curated content for kids/toddlers for Rs599/US\$8.55 for three months or Rs1,999/US\$28.50 a year. Select content is available free. New users get one month free trial usage. Lattu Kids has about 100,000 users (Jan 2019).

MiTiVi India

Unveiled in Oct 2018, OTT service MiTiVi carries 1,000+ live TV channels and over 500,000 hours of on-demand content, including movies, TV shows and songs. Set-up box costs Rs2,499/US\$35 with a 12 months free subscription.

MX Player

MX Player, owned by Times Internet Ltd (TIL), a subsidiary of The Times Group, started off as a cross-platform media player developed by South Korea's app publisher J2 Interactive, was majority acquired by Times Internet in June 2018 for Rs1,000 crores/US\$143 million. MX Player re-launched in Feb 2019 as a freemium video streaming service, offering original shows and 50,000+ hours of content from partners such as AltBalaji, Arre, TVF, Dice Media and Sony, as well as Pakistan's Hum TV and ARY, in 10 Indian languages. The Times group's foray into the digital entertainment space kicked off in 2013 with the launch of on-demand service BoxTV.com offering Hollywood, Bollywood and regional movies/TV content. The BoxTV.com service was shut down in 2016.

Netflix

Netflix launched in India in Jan 2016. Monthly direct-to-consumer plans cost between Rs500/US\$7.20 and Rs800/US\$11.50 for four HD/UHD screens. Available direct and through partnerships with telecom and broadband players like Airtel and ACT Broadband; and devices such as Vu TVs and OnePlus 7 Pro.

NexGTV

Mobile TV app NexGTV, offers 130+ live TV channels and 1,000+ movies/TV series/sports on-demand titles.

SonyLIV

Launched in Jan 2013, ad-based platform SonyLIV offers 40,000+ HD videos of select content from Sony Entertainment Network-branded channels and 700+ Bollywood/Hollywood movies as well as original web series, live sports (Indian cricket/football), live TV channels and music. Premium plans start from Rs29/US\$0.40 a month to Rs499/US\$7.13 a year.

Spuul

Global streaming service Spuul launched in 2012 targeting the South Asian Diaspora with over 10,000 hours of Hindi/regional language movies. In India, Spuul costs from Rs30/US\$0.40 to Rs150/US\$2.20 a month.

TVF Play

Internet media company The Viral Fever launched video streaming TVF Play in June 2015, offering original and acquired content.

Vodafone Play

Vodafone's OTT service, Vodafone Play, offers 300+ live streaming HD/SD TV channels in 14 languages in addition to int'l/Indian TV shows and a catalogue of 14,000+ movies to both prepaid and postpaid 3G/4G Vodafone subscribers. Vodafone Play also offers third-party OTT services such as Eros Now, Hoichoi, Hooq and YuppTV.

Voot/Voot Kids

Launched in May 2016, Voot is an ad-supported VOD platform offering 60,000+ hours of original series/webseries and select latest/library content to 80+ million active users a month. Voot Kids is a SVOD platform launched in Nov 2019, offering 20,000 local/international children/family titles at Rs799/US\$11 a year or Rs99/US\$1.38 a month (Nov 2019).

Wacho

Dish TV launched Wacho in April 2019 targeting mainly the younger audiences in India. Watcho offers 1,000+ hours of

library movies, short films and TV shows, as well as originals and UGC in Hindi, Kannada and Telugu. Dish TV's foray into original webseries includes *Vote the Hell*, which features comedians and their satirical take on the Indian elections; action/thriller drama *Mission Breaking News*; a comedy drama *Chhorian*; and thriller drama *Rakhta Chandana*. The Watcho app is available for download and view on the web for free.

YuppTV

YuppTV delivers 250+ live TV channels in 14 national/regional languages, 200+ TV shows and 3,000+ Bollywood/regional movies from India, short films, web series, starting from Rs99/US\$1.40 a month.

Zee5

Zee's global OTT freemium platform Zee5, launched in Feb 2018, consolidates Zee's former ad-based OZee and subscription-based dittoTV. Zee5's offering includes originals, Indian and int'l movies and TV shows, music, health and lifestyle across 12 languages (English, Hindi, Bengali, Malayalam, Tamil, Telugu, Kannada, Marathi, Oriya, Bhojpuri, Gujarati and Punjabi), as well as live TV channels. Zee5 costs Rs99/US\$1.50 a month. Available standalone and via Airtel Broadband, Samsung smart TVs, Amazon Fire Stick, Flipkart and Xiaomi Mi TV.

Production

Applause Entertainment

Aditya Birla Group-backed Applause Entertainment is a content and IP creation studio with a focus on creating digital drama series. Production credits include the Indian version of Israeli drama *Fauda* and family comedy *Mind the Malhotras*.

Balaji Telefilms

Balaji Telefilms was originally incorporated as a private limited company in 1994 and went public in 2000. Today, the listed company has produced over 17,000 hours of TV content, including drama series *Kyu Ki Saas Bhi Kabhi Bhau Thi* (Star Plus/Hotstar), *Bade Achhe Lagte Hain* (Sony Entertainment Television), *Pavitra Rishta* (Zee TV) and *Naagin* (Colors

TV). Balaji Telefilms is also involved in film production (Balaji Motion Pictures) and streaming services (AltBalaji).

Banjay Asia

Banjay Asia, a JV between Banijay Group and Deepak Dhar, creates content for TV, films and OTT platforms. Programme genres include entertainment, factual, scripted and reality for all territories in India as well as Asia. Productions driven by Banijay Asia include *ARRived*, *Roar of The Lion* and *The Kapil Sharma Show*.

Dharma Productions

Dharma Productions was founded in 1976, producing its first film *Dostana* starring Amitabh Bachchan. As of 2018, the company has produced more than 47 Hindi films, including 2019's period film *Kalank*.

Endemol Shine India

Endemol Shine India produces over 800 hours of programming annually, including TV shows like *Bigg Boss* (Hindi, Kannada, Tamil, Telugu, Marathi, Malayalam and Bangla), *Fear Factor*, *MasterChef India*, *So You Think You Can Dance* and over 450 episodes of *Deal or No Deal* for Sun Network.

Eros International Media

Eros International Media co-produces, acquires and distributes Indian language films in multiple formats worldwide. The company was founded in 1977.

Mango People Media

Mango People Media produced season two of *Love, Lust and Confusion* for Viu. The 13-episode romantic dramedy released in Mar 2019.

Red Chillies Entertainment

Red Chillies Entertainment was involved in the production of Netflix's original series, *The Bard of Blood*, which is based on Bilal Siddiqi's novel.

Sagar Productions

Sagar Productions engages in the media production and trading activities in India. The company produces TV programmes and TVC. Sagar Productions was incorporated in 1980 as Kirti Finvest Limited and rebranded as Sagar Productions in 2010.

Viniyard Films

The production house was involved in the production of Viu's original series *iB Cricket Super Over League* (premiered Feb 2019), a virtual cricket tournament game show for the India and Middle East markets.

Yash Raj Films

Yash Raj Films has produced over 75 films since it was founded in 1970. Services range from production to post production, domestic/international distribution, licensing and merchandising. Production credits include action/adventure film *Thugs of Hindostan* (2018), action thriller *Tiger Zinda Hai* (2017) and sports drama film *Sultan* (2016).

Telcos/mobile

Bharti Airtel

Established in July 1995, Bharti Airtel offers 2G/3G/4G, mobile commerce, fixed-line, high-speed DSL broadband, IPTV, DTH, OTT TV and enterprise services to 304.7 million subs across its operations in India (Sept 2019).

BSNL

State-owned telco BSNL provides fixed line and mobile telephony, internet, digital television and IPTV services to about 124 million customers.

Idea/Vodafone

Idea Cellular and Vodafone India completed its US\$23-billion merger in August 2018. The combined entity, which continues to operate as two separate mobile brands, reported 320 million total subscribers in India at the end of June 2019.

Mahanagar Telephone Nigam Limited (MTNL)

State-owned telco MTNL offers fixed-line, GSM/CDMA cellular and broadband services to about 3.5 million subscribers in Delhi and Mumbai areas.

Reliance Jio

Jio, a wholly owned subsidiary of Reliance Industries, is a LTE mobile network operator founded in 2010. The company launched commercial services in Sep 2016, disrupted the market in a big way with low-cost data, and quickly became a front runner with 331.3 million subscribers (June 2019).

Regulators

Department of Telecommunications (DOT)

The Department of Telecommunication is responsible for setting growth strategies, granting telecoms service licences and for spectrum management.

Adapted from **ContentAsia's The Big List 2020**

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What's on where...

January 2020	22-24	NATPE	Miami, U.S.
March 2020	5-6	AVIA OTT Summit	Singapore
	18-20	FICCI Frames	India
	25-28	Hong Kong FILMART	Hong Kong
	28-29	MIP Doc	Cannes, France
	28-29	MIP Formats	Cannes, France
	30-2 Apr	MIP TV	Cannes, France
April 2020	1-3	Content Expo Tokyo	Tokyo, Japan
	21-23	APOS	Bali, Indonesia
May 2020	6-8	Busan Contents Market (BCM)	Busan, South Korea
	12-19	L.A. Screenings Independents/ Studio Screenings	Los Angeles, U.S.
June 2020	3-5	MIP China	Hangzhou, China
	9-11	BroadcastAsia/CommunicAsia	Singapore
	11-13	Vietnam Telefilm	Ho Chi Minh City, Vietnam
July 2020	6-7	DW Global Media Forum	Bonn, Germany
August 2020	26-28	ContentAsia Summit	Bangkok, Thailand
September 2020	17-20	Gwangju ACE Fair 2020	Gwangju, South Korea
October 2020	10-11	MIP Junior	Cannes, France
	12-15	MIPCOM	Cannes, France
December 2020	2-4	Asia TV Forum & Market	Singapore
	7-8	Dubai International Content Market	Dubai

The full list of events is available at www.contentasia.tv/events-list



The Mandalorian rules Hong Kong

Disney+ series demand 93% up on Netflix's *The Witcher*

Disney's *The Mandalorian* demolished entertainment competition for the week of 19-25 December, generating almost double the activity than its closest rivals – Japanese anime series *My Hero Academia* and Netflix's *The Witcher*.

On the overall list of international TV shows tracked by data science company Parrot Analytics, demand for *The Mandalorian* was 73% higher than the #2 title in the top 10 – Japanese anime series *My Hero Academia* – and 93.4% ahead of *The Witcher*.

Iconic ViacomCBS show, *South Park*, banned in China last year for its attitude towards mainland policies, made it onto the Hong Kong top 10 list for the week with higher demand than seven of the titles on the digital list.

The top 10 for the week shows strong support for a variety of animated genres. In addition to *My Hero Academia* and *South Park*, the list includes kids animated series *Peppa Pig*, adult sci-fi sitcom *Rick and Morty* and pre-school property *PJ Masks*.

Top 10 overall TV shows: Hong Kong

Rank	Title	Average Demand Expressions®
1	<i>The Mandalorian</i>	844,951
2	<i>My Hero Academia</i>	487,598
3	<i>The Witcher</i>	436,875
4	<i>Peppa Pig</i>	417,963
5	<i>Rick and Morty</i>	412,593
6	<i>PJ Masks</i>	389,728
7	<i>Game of Thrones</i>	387,080
8	<i>The Flash</i>	314,887
9	<i>The Expanse</i>	312,234
10	<i>South Park</i>	308,702

Top 10 digital originals: Hong Kong

Rank	Title	Platform	Average Demand Expressions®
1	<i>The Mandalorian</i>	Disney+	844,951
2	<i>The Witcher</i>	Netflix	436,875
3	<i>The Expanse</i>	Prime Video	312,234
4	<i>Grandmaster Of Demonic Cultivation</i>	Tencent QQ	252,708
5	<i>The Handmaid's Tale</i>	Hulu	205,671
6	<i>The Crown</i>	Netflix	180,701
7	<i>Stranger Things</i>	Netflix	177,678
8	<i>Titans</i>	DC Universe	169,580
9	<i>The Grand Tour</i>	Prime Video	158,267
10	<i>The Man In The High Castle</i>	Prime Video	146,770

Date range: 19-25 December, 2019
 Demand Expressions® (DEX): The global TV measurement standard developed by Parrot Analytics, which represents the total audience demand being expressed for a title, within a market. Audience demand reflects the desire, engagement and viewership, weighted by importance; so a stream/download is a higher expression of demand than a 'like'/comment.



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