Market Guide for Video Platform Services

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Initiatives: CSP Digital Transformation and Innovation

> Video platform services provide digital and media content-driven organizations with the tools, services and workflow management to support video assets from ingestion to playout. CIOs with valuable content assets must evaluate VPS as providers of their ingest and delivery solution.

Overview

Key Findings

- Media-centric organizations that engage in video platform projects have many choices and perhaps too many options to accomplish their goals around delivery and monetization of assets.

- Nearly all video platform providers offer an option to deploy workflows on major hyperscale cloud, including AWS, Google and Microsoft Azure.

- Despite the industry narrative of cloud-first, Gartner sees a critical mass of solutions for on-premises platforms focused on maintaining legacy platform applications.

- Several large media/content companies have created delivery platforms that act as marketplaces and ecosystems. This requires competitors to partner to integrate data analytics and advertising platforms.

Recommendations

CIOs leading on the transformation of video delivery must:

- Choose a provider that can deliver a solution to meet current needs, but also provides a solution path for additional scale, security and analytics requirements in the future, as media workflow platforms are in a constant innovation cycle.

- Choose a provider by your requirements for a "split personality" on-premises and cloud by focusing on hybrid cloud deployments; beware of providers that don't offer cloud solutions.

- Reassess your custom development needs and instead test using common architecture frameworks; build where you have competitive advantage.

- Choose a solution that supports growth based on customer acquisition, churn reduction and advertising.

Strategic Planning Assumption

Through 2025, the number of CSPs incorporating content and media products and service management solutions for better growth will rise from less than 1% in 2020 to 40%.
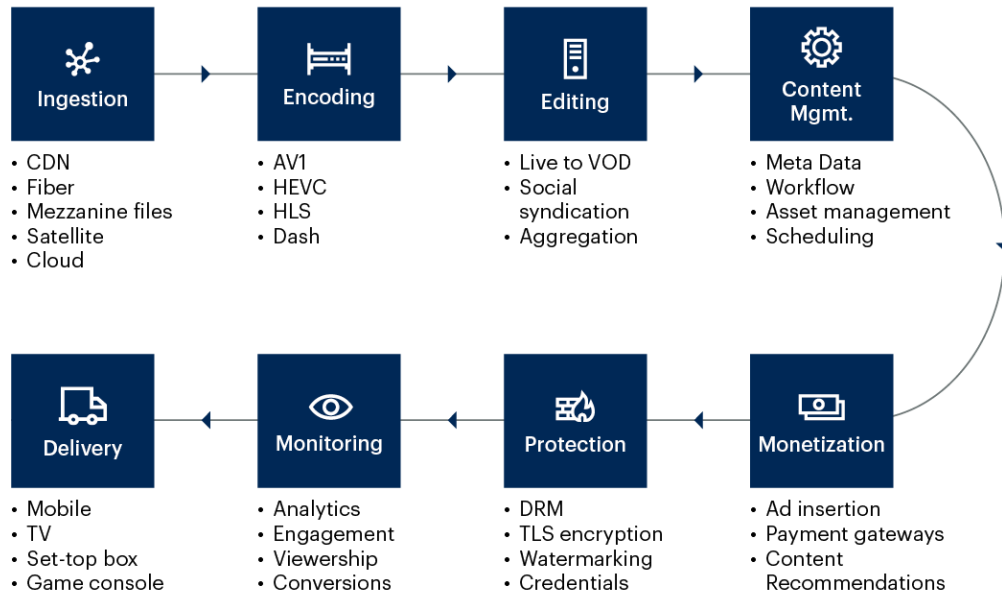
Market Definition

Video platform services (VPS) provide digital and content-driven organizations with the tools, services and workflow management to support video assets from ingestion to playout. VPS workflow typically includes the following services: ingestion, encoding, editing, asset management, protection, monetization, packaging, monitoring and playout. VPS providers must support all the elements of the workflow with either homegrown or partner-integrated solutions. Offerings can be delivered via a self-service interface, an API gateway or a managed service contract. The media and entertainment (M&E) industry is the largest adopter, but video platforms can assist any organization in its digital asset management and monetization strategies.

Market Description

The intensive growth of video for enterprise, media, entertainment and gaming delivery has created a need for a spectrum of video workflow services. VPS providers continue to develop offerings that allow content owners to import their video assets into their content management systems and then choose individual or complete packing services, as well as the degree of self-service or full management. The depth of service offerings continues to grow to support increasing numbers of streaming viewers of live, on-demand and sports-based content. The providers evaluated primarily focus on video services for on-demand workflows, including over-the-top (OTT) streaming libraries for entertainment providers (Netflix, Hulu, Disney+, iQIYI) and service businesses (houses of worship, fitness centers, education institutions). Figure 1 shows a common video workflow for video on-demand services for an OTT streaming provider.

Figure 1: Gartner's Reference Model OTT Video Worfkflow

Gartner's Reference Model OTT Video Worfkflow

Ingestion
- CDN
- Fiber
- Mezzanine files
- Satellite
- Cloud

Encoding
- AV1
- HEVC
- HLS
- Dash

Editing
- Live to VOD
- Social syndication
- Aggregation

Content Mgmt.
- Meta Data
- Workflow
- Asset management
- Scheduling

Delivery
- Mobile
- TV
- Set-top box
- Game console

Monitoring
- Analytics
- Engagement
- Viewership
- Conversions

Protection
- DRM
- TLS encryption
- Watermarking
- Credentials

Monetization
- Ad insertion
- Payment gateways
- Content Recommendations

Source: Gartner
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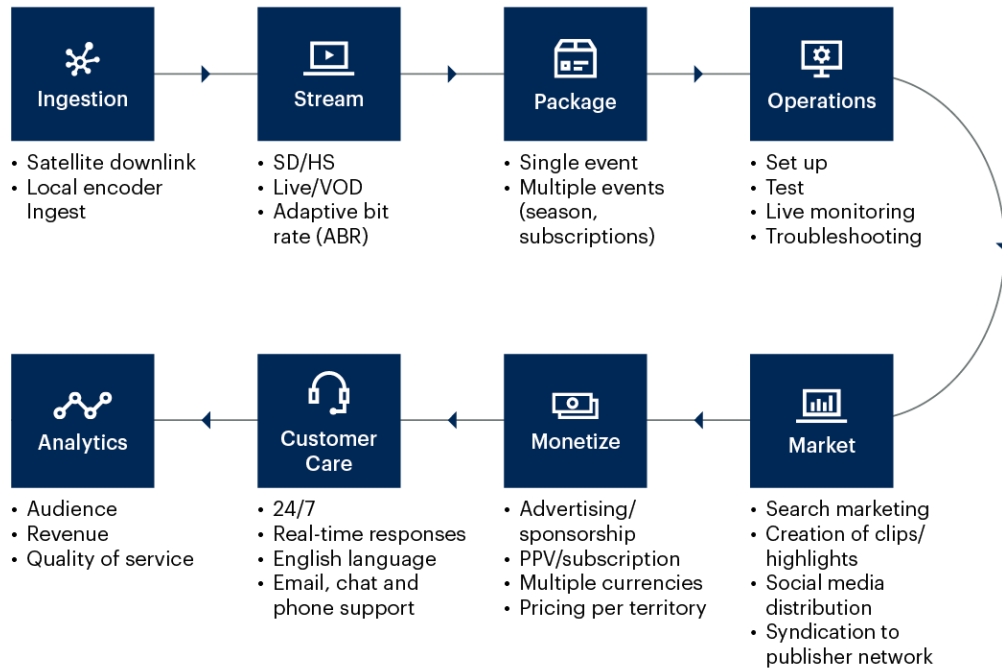Gartner

Nearly 75% of the platform vendors included in this analysis provided all of the workflow elements, either with internal services or through partner solutions. The two workflow elements with the highest frequency of partner usage were protection (content security) and delivery (content delivery network [CDN], broadband, satellite). Amazon Web Services is the only provider that has built and maintained its own CDN network, and that does not leverage third-party networks for endpoint delivery.

This analysis focuses on the solutions supporting video-on-demand assets. Live events, including professional and esports, concerts and other competitions, dictate a slightly different workflow process. Figure 2 shows the common live event workflow architecture being adopted industrywide.

Figure 2: Gartner Definition of Live Video Workflow

Gartner Definition of Live Video Workflow

Ingestion
- Satellite downlink
- Local encoder Ingest

Stream
- SD/HS
- Live/VOD
- Adaptive bit rate (ABR)

Package
- Single event
- Multiple events (season, subscriptions)

Operations
- Set up
- Test
- Live monitoring
- Troubleshooting

Analytics
- Audience
- Revenue
- Quality of service

Customer Care
- 24/7
- Real-time responses
- English language
- Email, chat and phone support

Monetize
- Advertising/ sponsorship
- PPV/subscription
- Multiple currencies
- Pricing per territory

Market
- Search marketing
- Creation of clips/ highlights
- Social media distribution
- Syndication to publisher network

Source: Gartner
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Gartner

Market Direction

The trajectory of growth for VPS resembles a roller coaster ride over the past 24 months. Prepandemic trends focused on M&E organizations scaling their linear TV, on-demand and streaming platforms to meet demands of increased viewers. Many content and rights holders plan on:

- **Consolidation of OTT streaming platforms** — Postpandemic consumer viewing trends have encouraged large media organizations to create their own direct-to-consumer platforms where they can own the customer relationship. This proliferation of disparate OTT platforms will further fragment the consumer's content choice. This will feed a continual cycle or mergers and acquisition of smaller and regional OTT providers to help larger companies fill portfolio gaps.

- **Innovation of content monetization strategies** — Many M&E providers had to build their own proprietary applications to run broadcast and content operations, as prebuilt industry solutions were uncommon. It was an operational necessity to invest in or build capabilities to manage radical fluctuations in viewership, customer retention and service delivery. Gartner believes that the most effective content monetization strategy must focus on achieving business KPIs that include maximizing return on invested capital through growing customer lifetime value and reducing customer acquisition costs. Growth of customer LTV is based on increasing average revenue per user and minimizing churn — and building customized, proprietary stacks must be considered only if a scalable solution does not exist to meet individual needs.

- **Increased reliance on public and hybrid cloud platforms** — In order to maintain profitable revenue growth as video workflows scale, providers continue to plan on cloud migrations for their core video workflows. These modernization projects will all happen at a pace that allows content owners and broadcasters to minimize disruption in both on-demand and live video delivery. This will reorient providers to continue with innovation around content recommendations, bundling and 4K/8K playout.

Market Analysis

The M&E market has endured many disruptive trends in the past several months. Government regulation and creation of large direct-to-consumer platforms, as well as the COVID-19 pandemic, have acted as powerful catalysts for adoption of new process, technologies and delivery models, including:

- **Net new platform opportunities** — Expanding beyond existing OTT opportunities into on-premises and enterprise opportunities, including fitness, distance learning, houses of worship and omnichannel selling.

- **Media companies go direct to consumers and bypass telcos** — Telecom providers do their own consumer relationship, but cultivating a direct relationship provides greater engagement and monetization opportunities for media companies.

- **Licensing** — Sharp increase of viewing hours by younger audiences provides opportunities for crossover distribution and licensing via interactive channels, including Bilibili, Twitch, Discord and TikTok.

- **Degree of management/support** — Many providers are building user interfaces that support API and self-service provisioning; however, many users will require managed, guided and professional services from onboarding to optimization. Increased cloud utilization will lead to the need for hybrid managed services.

Despite increased consumer streaming resulting from the pandemic's lockdown effect, not all M&E content providers experienced strong growth. Many segments, including regional or smaller direct-to-consumer OTT providers, saw increased competition for users. Driving differentiation and growth ascended to the top priority in the market with a focus on:

- Cloud-based workflow migration, archive management, CDN playout and UI/UX improvements

- Churn and subscriber management — helping customers understand their clients, how to engage and upsell into higher ARPU services

- Monetization — cross-platform advertising, improved ad utilization and improved customer experience

Representative Vendors

The vendors listed in this Market Guide do not imply an exhaustive list. This section is intended to provide more understanding of the market and its offerings.

Market Introduction

The vendors in Table 1 generate interest from Gartner clients and continue to appear on RFI and client shortlists. The list above indicates the primary use case (monetizing video-on-demand assets) in which Gartner clients engage providers. Providers can operate in one of several use cases based on degrees of workflow support, preferred tenancy and regional requirements (see Notes 1 and 2).

Table 1: Representative Vendors in Video Platform Services

(Enlarged table in Appendix)

	Single Tenant	Multitenant	Hybrid
Accedo		X	X
Agile Content	X	X	X
Amagi			
Amazon Web Services	X	X	
ATEME	X	X	X
Bitmovin		X	
Deluxe	X	X	
Easel TV		X	
Endeavor Streaming	X	X	X
Globecast	X	X	
Imagine Communications	X	X	X
MediaKind	X	X	X
Red Bee Media	X	X	X
SDVI	X	X	X
Vimeo		X	
Zype		X	

Source: Gartner (required)

Vendor Profiles

Accedo

Accedo (https://www.accedo.tv/), founded in 2007 with headquarters in Stockholm, Sweden, started as a low-cost app developer on a myriad of connected TV devices for media companies and an app store platform for operators. Accedo now provides a combination of the products and services needed to support media and operator customers at every stage of the video business journey, from strategy and conception through to delivery and postlaunch optimization.

Accedo's flagship product, Accedo One, is a plug-n-play platform for OTT video streaming, starting from the end-user app backward to OVP and video catalog. Offered as a SaaS platform and includes a marketplace ecosystem consisting of a wide range of best-of-breed vendors (e.g., analytics, monetization and security) that can be easily integrated as your service evolves. Accedo's customer base includes large operators and media companies around the world, including Deutsche Telekom, Dish, Sky, HBO, SHOWTIME, CNN, Discovery Channel and STARZ. Accedo is backed by SEB Private Equity, having raised over $28 million for continued growth and M&A. Consider using Accedo for building complete end-to-end branded media OTT video playout services and for general video workflow needs where additional UX development and consultative services around modernization are required.

Agile Content

Agile Content-Edgeware (https://www.agilecontent.com). Agile Content, which is based in Barcelona, Spain, acquired Sweden-based Edgeware in 2021. The combined entity will have approximately 250 employees and will continue to target OTT providers, broadcasters, pay-TV providers and cable operators. Agile Content's core business was more focused around content management and monetization, and the Edgeware acquisition expands its portfolio greatly. The Edgeware portfolio brings increased services to support multi-CDN distribution, as well as its core subtitling solution called Cavena. Edgeware's go-to-market extended to many global regions, including APAC, South America and Western Europe; Agile Content has a similar customer footprint. Gartner does not see Agile Content-Edgeware actively competing in North America and recommends that prospects request several reference customer conversations to determine the company's on-the-ground delivery and support in North America.

Consider using Agile Content-Edgeware for complete video workflow requirements in markets where the company has strengths in operations and sales support.

Amagi

Amagi (https://www.amagi.com) was founded in 2008. It is headquartered in Bangalore, India, with a global presence. Amagi's technology enables the management, distribution and monetization of linear, live and on-demand channels across cable, OTT, and free ad-supported TV (FAST TV). Its solutions provide cloud-native end-to-end capabilities for video and content management, linear channel creation, channel distribution, virtualized broadcast operations, unified broadcast workflows, and VOD workflows, as well as ads insertion, brokering and monetization. Its solutions are geared to both content owners and TV networks. Amagi offers its capabilities through a SaaS model, license-based (SW purchase) or as a fully managed service. With its combined and unified broadcast and streaming/OTT/subscription video on demand (SVOD) digital distribution platform, Amagi is also able to help broadcasters move their traditional on-premises infrastructure to the cloud.

Some of Amagi's competition comes from niche digital players, as well as traditional video platform providers that are increasingly moving to cloud playout. Amagi recognized that cloud-based solutions are challenged with latency concerns and is working to address latency issues for applications and workflows that require extreme low latency. Another area it is looking to improve through innovation is to make better use of AI/ML technologies and techniques in order to automate the many dispersed and siloed solutions and business processes across various workloads.

Consider using Amagi when you are looking to modernize your linear programming, you are starting to offer streaming services, your capabilities span on-premises and cloud operations, and when you need comprehensive ads insertion and brokering solutions.

Amazon Web Services

AWS (https://aws.amazon.com), a division of Amazon, based in Seattle, Washington, U.S., has taken deliberate steps to increase the reach and breadth of media services to include use cases for live and on-demand video workflows. The service portfolio, based on AWS Elemental, supports self-service scalable media workflow, focusing on video ingestion, packing, and distribution for content creators and publishers in the M&E sectors. The company has also developed a portfolio of physical devices that support in-venue media processing. Organizations requiring extensive legacy integration and managed services will need to either lean on AWS Professional Services or contract with a system integration firm to leverage the full ability of the AWS platform.

The media services business allows AWS to seek large, dynamic partnerships with media giants, sports leagues and major brands. In addition to license streaming rights through Amazon Prime Video for the Bundesliga and selected NFL games, AWS looks for partnerships to deliver analytics and insights to enhance the fan experience. An example is the partnership with the NHL, which moves beyond delivering HD and 4K streaming to participate in delivering in-game analysis and technologies around player and puck tracking. In April 2021, AWS announced Amazon Nimble Studio, a service that enables customers to set up a content production studio using the on-demand, elastic capabilities of AWS cloud services. Amazon Nimble Studio is designed to create an environment where artists can produce content and collaborate using virtual workstations, high-speed storage and scalable rendering using AWS services.

Consider AWS for media workflow solutions where scalability and developer agility are key requirements.

ATEME

ATEME (https://www.ateme.com) was founded in 1991 and is headquartered in France. ATEME's processing and delivery offering focuses on content providers, pay-TV broadcasters and streaming media services. Supporting on-premises, cloud and hybrid deployments for its clients, the company offers a variety of contract options ranging from perpetual licenses to multiyear contracts via short- or long-term subscription. This flexibility enables ATEME to address customer budgetary constraints, interests and vision. ATEME's 2020 acquisition of Anevia further strengthens its ability to support cableTV and broascaster's modernization initiatives.

ATEME focuses on six competitive areas: optimizing quality of experience, lowering total cost of ownership, green services to reduce carbon footprint, creating additional revenue streams with dynamic ad insertion, technological advancements, including 5G, and personalization of content.

ATEME differentiates its service in ways that are primarily driven by the high end of the market. It is fully technologically independent, meaning it is not reliant on plug-and-play third-party solutions, and is, therefore, free to push for effective tech innovation. It also focuses on simplifying the options available in order to include more value for all customers and drive business innovations.

Consider partnering with ATEME when moving from on-premises to hybrid or cloud solutions and when transforming video delivery for innovation.

Bitmovin

Bitmovin (https://bitmovin.com), founded in 2013 with headquarters in San Francisco, California, U.S., and Vienna, Austria, started life as an API-driven video platform and video player provider. Bitmovin has expanded its offering to provide developer-centric software to deliver most elements of video workflow, including encoding, metadata, DRM, packaging, playout and analytics. Its core value proposition revolves around reducing complexity and cost, while empowering developers with increased performance and quality with technology, including multipass encoding and ABR. Pricing for services in usage is based on encoding, analytics and players' platforms. Bitmovin's customer base consists of large advertising and subscription VODs, direct-to-consumer platforms, broadcasters and nonmedia companies. Customers include DAZN, fuboTV, ClassPass, RTL Group and Globo. Bitmovin is a Round-C-funded company that continues to explore additional segments, including midmarket companies and partnerships for customized services.

Consider using Bitmovin for the entire spectrum of video workflow services for high-scale global playout, where projects are driven from DevOps and engineering teams.

Deluxe

Deluxe (https://www.bydeluxe.com/en) is over a century old, having begun as a film processing lab in 1915. Its modern digital video workflow solution, named Deluxe One, aims to serve the same market of studios and content creators with an end-to-end cloud platform. Its focus is primarily upmarket, with a dedicated focus on the value of deep customization within the platform. This includes both an open-API-driven architecture and customizable delivery options.

To encourage customization, Deluxe offers an open marketplace for vendors to build solutions that can be integrated easily into the video supply chain via Deluxe One. It offers three product distinctions inside the Deluxe One brand: Deluxe One Showcase for immersive viewing experience, Deluxe One Dub for frame-accurate remote audio recording, and One VZN for distribution to theatrical release. This focus on use cases for traditional production and release strategies explains why current customers include large media organizations such as MGM, Lionsgate and NBCUniversal.

Consider using Deluxe as a solution provider if you need in-depth customization, work with specific components of video workflow already, or have needs in production or distribution that align with traditional models.

Easel TV

Easel TV (http://www.easeltv.com) is an exclusively cloud-based OTT service that operates as a platform that covers the complete video workflow from ingest to playback and includes monetization, analytics and content rights protection. This integrated workflow stands out as one of its key differentiators, while not limiting its aspirations for more custom clients. It targets a usage rate of around 90% off the shelf, 10% high-content-level partners. This usage rate allows the company to benefit from a high volume of client feedback to continually improve UX, while maintaining the flexibility to customize as needed. The client list includes NBCUniversal (reality TV), Soho Theatre (digital theatre) and Techlive Solutions (hotel TV and VOD).

Easel TV leverages a SaaS model to provide cost advantages and consistent updates to its service. It runs the media content through Azure and content management and tooling through AWS. The most differentiated technology it provides is a marketing engine that uses flexible business rules to ingest data sources that can target improvement to outcomes such as customer acquisition cost and life cycle management.

Consider using Easel TV when seeking an all-in-one workflow for quickly launching a service, and options to expand into custom solutions with growth.

Endeavor Streaming

Endeavor Streaming (https://www.endeavorstreaming.com), based in Plainview, New York, U.S., is a subsidiary of Endeavor Group, which includes holdings in artist management, sports leagues, branding/licensing, creative and public relations companies. Endeavor raised its video streaming and monetization profile with the 2019 acquisition of NeuLion. Similar to its peers, Endeavor focused on media supply chain elements, including encoding, metadata management, content protection and packings. It also has a growing focus on value-added services around content personalization, subscription/packaging and custom UI/UX development. The client heritage for both NeuLion and Endeavor is heavily skewed with sports, OTT and consumer brands (UFC, Univision, WWE), which has provided a platform for growth. Gartner sees an opportunity for Endeavor to expand its go-to-market to include emerging enterprise use, including training and distance learning.

Consider Endeavor for all workflow elements, as well as support for monetization of large global sports franchises and brands.

Globecast

Globecast (https://www.globecast.com), a subsidiary of Orange since 2006, was spun out of France Telecom in 1997 and offers services to the radio, TV and media industries, including formatting, aggregation, transmission and distribution. Globecast has a global presence for satellite and terrestrial distribution, with points of presence in Europe, North America, Asia, Africa and the Middle East (clients include Ariang TV, AMC Networks and Virgin Media).

Globecast services include:

- Delivery of content through satellite, terrestrial and OTT TV Everywhere

- Cloud media manager for playout and VOD

- Distribution services, including content acquisition, aggregation and distribution

- Live media production services for sports events and news, including on-site technical management and remote production

Globecast's TV Everywhere is a fully managed, comprehensive end-to-end OTT video streaming service. The service offers content acquisition, transcoding, packaging, DRM and live time-shifting, and integrates with multiple OVP and CDNs solutions. The solution supports a variety of business models, including ad-supported, subscription pay TV, pay per view and SVOD.

Consider using Globecast when the focus on requirements is playout-centric for both streaming and broadcast and where wide-scale global distribution is needed.

Imagine Communications

Imagine Communications (https://imaginecommunications.com), with over 50 years of innovation in the TV industry, was split off from Harris Corp. (now L3Harris Technologies) in 2014. Imagine Communications works with global media companies, delivering 25,000 of the world's 50,000 commercial TV channels, and $46 billion in annual ad sales globally. Customers include Disney, Sky, Discovery, Sinclair Broadcast Group and Comcast.

Imagine Communications' "Make TV" products offer software-based solutions for playout, sports and live TV. This suite allows broadcasters to operate a single playout environment to produce content for broadcast, OTT, linear, nonlinear, mobile or any other platform. The product portfolio offers both on-premises and cloud-enabled solutions around automation, control, orchestration, content delivery, content management and content production,

Imagine Communications solutions for sports and other live events offer a mobile and on-site production suite, which includes a portfolio of solutions ranging from networking, ingest, storage and processing to contribution and playout.

Imagine "Monetize TV" products offer a complete solution for monetization, including dynamic ad insertion, rights and scheduling, finance, optimization, ad sales and traffic. $1 out of every $4 of television ad spend globally is sold and/or trafficked through an Imagine solution across linear, nonlinear, addressable and on-demand delivery systems.

Consider using Imagine when workflow requirements include both software and hardware solutions, as well as the ability to meet unpredictable scale requirements for both streaming and broadcast.

MediaKind

MediaKind (https://www.mediakind.com) was originally Ericsson Media Solutions before Ericsson spun out 51% ownership to One Equity partners in 2018. Its technology origins traverse back to 1991 with its implementation of MPEG-1 Encoder. It is currently headquartered in Frisco, Texas, U.S., with a worldwide presence. Subsequently, the company has been involved with various innovative technologies addressing the media and content-related needs from creators of content to the distributors, as well as advertisers, both traditional and OTTs. Customers include Altice, Telefonica, SFR and CCTV. Its products span video processing and storage, video decoding, process management and control, stream processing and modulation, and its media platforms (IPTV, cloud-based TV, VOD content management).

Consider using MediaKind when your needs are focused on transforming the media production workflow with a focus on media and content processing capabilities and customer experience.

Red Bee Media

Red Bee Media (https://www.redbeemedia.com) has its origins in 2002 as a BBC subsidiary BBC, which was subsequently sold to Creative Broadcast Services Holdings (owned by Macquarie Group) in Australia and renamed Red Bee Media. Ericsson purchased the company in 2014, and rebranded it as Ericsson Broadcast and Media Services. It again emerged with the Red Bee Media brand in 2017. It is fully owned by Ericsson, headquartered in Stockholm, Sweden, with a worldwide presence. Customers include Atresmedia, Canal Plus, ITV and RTE. Red Bee provides managed media services to content creators, distributors, owners and content brokers worldwide. It serves broadcasters, studios, rights owners, aggregators, telecom operators, OTT/streaming providers, live entertainment producers and sports organizations. Its cloud-based end-to-end managed service platform and capabilities span various workflows across playout, OTT, distribution, access services (captions, audio description, signing), content discovery (metadata and recommendations), postproduction and media management.

Consider using Red Bee when you require services to transform or enhance your broadcast operations, media distribution workflows, content enrichment and monetization of rights and media assets.

SDVI

SDVI (https://www.sdvi.com), founded in 2013 and headquartered in Silicon Valley, California, U.S., focuses on optimizing the entire media supply chain, rather than simply considering the discrete unit of importance to be a single media asset. This allows it to manage the end-to-end cost and quality of complete delivery, rather than the metrics associated with determining the most efficient way to move content from ingestion to distribution. Customers include Discovery Networks, Sky WarnerMedia and ViacomCBS.

Its target addressable market is large media firms, with clients that include FOX TV and Discovery. With its platform SDVI Rally, SDVI provides cloud-native, consumption-based media services that are tailored to client needs. It provides elastic infrastructure that dynamically scales to meet fluctuations in demand while proactively modeling costs. This aligns with its values of prioritizing efficiency, agility and intelligence, and leveraging data generated by elements of the supply chain to measure unit economics and improve predictability.

Consider using SDVI when efficiencies in video supply chain are of the utmost importance, such as when these benefits drastically reduce costs, as well as when it is essential to be able to accurately predict future costs.

Vimeo

Vimeo (https://vimeo.com), based in New York, New York, U.S., offers an integrated OTT solution that covers workflow from ingestion to delivery, and supports free, ad-based, subscription and live streaming models. Vimeo began as a consumer-focused video company in 2004, with this distinction driving a deep focus on consumer experience and the philosophy that video strategy should include everyone.

While clients include media organizations like The Criterion Channel, IndieFlix or Collegehumor, the majority of its users are small-to-medium businesses that leverage OTT for niche media or as an additional source of revenue for their physical business. This focus has proven effective, as over 50% of its OTT pipeline began as B2C Vimeo users. Moreover, it offers tools for video creation and capture, including accessible live streaming.

For large enterprises, adoption of the platform comes from novel use cases such as branded content, in addition to standard entertainment.

Vimeo's consumer-first history helps promote growth, as 60% of the large global companies have existing Vimeo accounts. In addition to OTT, Vimeo offers an ECVM product for use cases like executive communication, training and onboarding, customer communication, and virtual events.

Consider using Vimeo when consumer-focused UX is a priority and when seeking a single video platform that can extend to additional enterprise use cases.

Zype

Zype (https://www.zype.com), founded in 2014, is headquartered in New York, New York, U.S., with engineering and support resources in Buenos Aires and Europe. It is an API-first video platform provider that supports the entire video workflow, with a focus on encoding, playout, delivery and content management. It targets M&E, as well as enterprises with a focus on both SME and larger organizations. Customers include Crunch Fitness, Vox Media, Vevo and Konami. Its original target role is a VP level in product engineering, but it continues to resonate with creative and marketing organizations. Zype also sees an increased influence of the "video ops" role in media-centric companies to add to the influence of DevOps teams.

What separates Zype from other providers of its size and scope is its ability to customize and integrate third-party applications through its connectors. Connectors include video delivery and publishing (OTT, mobile, social media, MVPD and web) payment platforms (payment processors and in-app purchases) and marketing tools (email, CRM and BI). The strategy to enable developers around the art of the possible is complemented by its support and consultative resources. Consider using Zype when requirements dictate both extensive integration and a moderate degree of consulting for content creators, brands and enterprises.

Market Recommendations

- Choose a video platform provider by ensuring that its services are aligned with your digital business. As M&E requirements encompass on-demand, live, in-venue and augmented/virtual reality, ensure your provider develops a forward-thinking roadmap. Don't lock in to a provider that can't match your growth trajectory.

- Keep contract duration from three to four years. Gartner predicts that pricing model innovation, as well as price compression, will increase through 2025.

- For developer-led workloads, choose a video platform provider that has AP, CLI and portal functionality and developer integrations. Most VPPs are themselves learning to incorporate self-service and managed delivery and support services.

Note 1: Representative Vendor Selection

At the time of this Market Guide's publication, each representative vendor listed supports at least six of the eight video-on-demand OTT workflow subelements.

Note 2: Gartner's Initial Market Coverage

This Market Guide provides Gartner's initial coverage of the market and focuses on the market definition, rationale for the market and market dynamics.

Recommended by the Authors

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Forecast: Enterprise IT Spending for the Communications, Media and Services Markets, Worldwide, 2019-2025, 2Q21 Update

Innovation Insight for Entertainment, Gaming and Sports Video

Market Trend: Expand CSPs' Monetization With 5G, AI, Edge Compute

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Globecast	X	X	
Imagine Communications	X	X	X
MediaKind	X	X	X
Red Bee Media	X	X	X
SDVI	X	X	X
Vimeo		X	

Zype	X

Source: Gartner (required)