

JUNE 2021

# ASIA VIDEO PULSE

THE NEWSLETTER OF THE ASIA VIDEO INDUSTRY ASSOCIATION



## Changing Industry - Changing AVIA

For those of us who have been in this industry for a while, there are memories of when things were stable and growth was steady. People moved jobs from time to time, but not often, and not at the rate we are seeing now. We are now in an era of constant rapid change, with growth and innovation sitting alongside closures and sadly, job losses.

Recent months only serve to underscore how profound these changes are. On one level nothing should have been that surprising. We all knew Disney+Hotstar was the priority of Disney and so the channel closures shouldn't have come as a surprise. We all knew that Discovery might be part of another merger so the teaming up with WarnerMedia shouldn't have shocked us. But despite the predictability of these types of events, we never know exactly what it will be or when it will happen and these two changes in particular will reshape our landscape in profound ways.

AVIA continues to sit at the epicentre of these changes. And we embrace change because to do otherwise would be foolish. But as our industry changes, our role becomes more important. We need to explain these changes to government, and ensure that they understand the part we play and how we differ from social media and big tech. We need to try even harder to ensure they understand the threat of piracy and IP theft. And we need to ensure that the industry sticks together and works together for the benefit of the entire ecosystem .

UPCOMING

AVIA TECHTALKS

JULY 8

VIETNAM

IN VIEW

SEP 8

STATE OF  
PIRACY SUMMIT

NOV 8

ASIA VIDEO  
SUMMIT

NOV 8 - 11

**avia**  
ASIA VIDEO INDUSTRY ASSOCIATION

2021 is a year of change for AVIA as well, as we see changes in both the key roles of Chief Policy Officer and CAP General Manager. John Medeiros joined what was the Cable and Satellite Broadcast Association of Asia back in 2005 as Vice President of Regulatory and Anti-Piracy Affairs, before becoming deputy CEO and then from 2012, our Chief Policy Officer. Over the last 16 years, he has been responsible for making the policy work that we do central to the association and the single biggest factor in our longevity. It is difficult to do justice to his contribution.

Neil Gane came in to run the Coalition Against Piracy when it was founded at the end of 2017 and since then has made an invaluable contribution to AVIA and to our industry by making the fight against piracy at the heart of what AVIA stands for. And his efforts, hard work and dedication have yielded many wins and a real difference in the piracy landscape of Southeast Asia. I want to express my deep gratitude to John and Neil and wish them both well for the future.



While change may not be easy, it is exciting and I am excited that we have two extremely talented and capable people stepping into the roles. **Celeste Campbell-Pitt** has joined us to be the new **Chief Policy Officer** and **Aaron Herps** steps up from his role as Operations Manager to become the new **General Manager of CAP**. The two of them make a wonderful team together and I am confident they will build upon and expand on the roles they have inherited.

It is a new era for AVIA as every day we wake up to an increasingly new era for our industry.

## *Marketplace - A New Partnership*



AVIA is delighted to announce a partnership with **Vuulr**, the global online content marketplace for premium Film & TV content rights, connecting distributors and buyers of content worldwide 24/7.

As part of the partnership, Vuulr has launched an AVIA-branded [Marketplace](http://www.avia.vuulr.com), [www.avia.vuulr.com](http://www.avia.vuulr.com), which features all of the content available across the Vuulr catalogue.

By choosing to transact through the [AVIA Marketplace](#), all transactions will contribute directly to the health of the video industry in Asia. For every successful deal that takes place within the [AVIA Marketplace](#), a portion of the commission will go directly to supporting AVIA and its causes towards the growth of industry in Asia. Simply register as a buyer or seller under AVIA to be part of this initiative.

We look forward to receiving your support and seeing you on the platform!

# POLICY MATTERS



## JOHN MEDEIROS

### CHIEF POLICY OFFICER

AVIA's Policy work has continued unabated in recent months, despite the ongoing restrictions on travel. In the past few months, alongside the usual submissions and letters, we've directly engaged several governments in one-to-one discussions via Zoom, as well as co-hosting an Indonesian Policy Roundtable.



In March, Louis, John and Clare met with the the **Pakistan Telecommunication Authority (PTA)**, to discuss regulation of online video services. The session, which was well attended on the Pakistani side, focused on introducing PTA to the concept of Online Curated Content (OCC) and how it is different to OTT.

We also introduced them to the **AVIA Governance Framework** as well as highlighting best practices around the region. Finally, we updated them on last fall's consumer research which explored consumer sentiments and found that they much prefer to have self-control on what content to watch and when. Following the presentation, there was a more detailed discussion with PTA on self-regulation and co-regulation. We also highlighted the challenges for the industry with regards to piracy and how heavy regulation of the legitimate industry only increases barriers for content producers whilst having no effect on pirate sources. This was the first time AVIA had directly participated in a discussion with the PTA and it was a welcome opportunity to open a dialogue with a market that has traditionally been harder to engage.

*AVIA is the authoritative resource for the state of regulation across Asia*

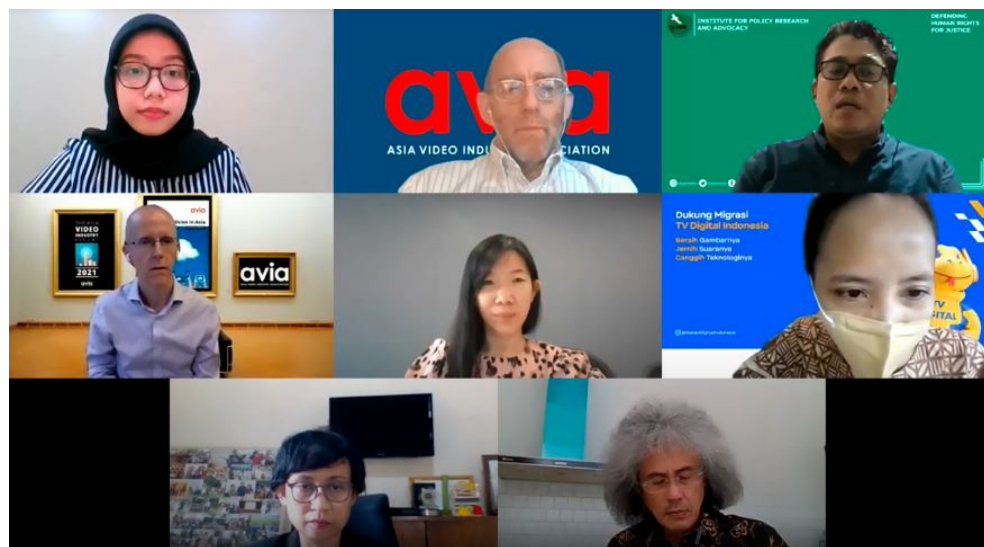


In April, a similar discussion was held with Thai regulators by request of the **National Broadcasting Telecommunications Commission (NBTC)**. Again, John and Clare were invited to give a one-on-one presentation to the NBTC, focussed on **OCC governance**, with a request to look specifically at what other regulators in the region are doing. The NBTC Vice Chairman, Dr. Natee Sukonrat, led the NBTC delegation and participated in a lengthy dialogue following the presentation.



In particular, he was interested in exploring the concept of **local content quotas** and whether a way could be found to encourage more international investment and cooperation in developing the Thai content production industry. He was also keen to discuss licensing and a detailed discussion was held on the NBTC's desire to develop a **regulator-led, light touch licensing system**. It was a useful opportunity to check-in with the NBTC as well as gain insights into their developing thinking. AVIA offered to organise additional sessions, including one directly with representatives of the international OCC industry, to have a frank discussion on indigenous-content cooperation and collaboration.

Our final piece of (virtual) face-to-face engagement was in late April when AVIA co-hosted an Indonesia-specific **Policy Roundtable**, in partnership with the Jakarta-based Institute for Policy Research and Advocacy (ELSAM). Held over two days with simultaneous translation, this was an event which brought together approximately 60 Indonesian regulators, industry and academia with the international community.



*Left to Right from Top:*  
 Alia Yofira, ELSAM  
 John Medeiros, Chief Policy Officer,  
 Wahyudi Djafar, Executive Director,  
 ELSAM  
 Louis Boswell, CEO, AVIA  
 Esther Peh, Lead, International  
 External & Regulatory Affairs, Asia  
 Pacific, AT&T | WarnerMedia  
 Renny Silfianingrum, Subdirector  
 Radio, Kominfo  
 Shita Laksmi, Executive Director, TIFA  
 Foundation (moderator)  
 Haris Jauhari, Video Journalist  
 Association (AJV)

The roundtable covered discussions focusing on **regulatory complexities**, looking at current gaps in regulation and how, in particular, current legislation on content and the **Information and Electronic Transactions Law (ITE Law)**, which collectively regulate online content, are inadequate as they do not capture the significant differences between online content types e.g. UGC, OCC etc. This was underlined by the Kominfo speaker who noted that the Broadcasting Law did not apply to online content and that the ITE law was unable to distinguish between different types of content. The second day of discussion focused on implementing **regulations on e-commerce platforms**, and how online platforms can and should comply with them. The discussion drew this comparison back to online content and how platforms were motivated to self-regulate. This was a useful opportunity for all sides to share information on an evolving area, with active engagement from the regulator, Kominfo, which opens the door for future dialogue.





Finally, as many of you will have seen recently announced, I will be retiring at the end of June and this will be my last contribution to “Asia Video Pulse” as AVIA’s Chief Policy officer. We’re delighted to welcome **Celeste Campbell-Pitt** to lead the AVIA policy team. Celeste, who will be Singapore-based, has a wealth of industry experience and I know she is looking forward to working with all of you.

For my part, this is a bittersweet moment. On the one hand, it is time for me to move to the next stage of my life and I hope to indulge my long-delayed personal plans to travel more, live in a cool climate, and see other parts of the world. On the other hand, these last months have been a profoundly alienating period, because of the pandemic. Sixteen years of work on this industry, in both CASBAA and AVIA, have enriched my life beyond all expectation with personal ties around this entire region and I deeply regret that I cannot renew those connections in person before I leave. That said, I don’t plan to just disappear, and I’m hopeful that I will be able to return to Asia when quarantine constraints are lowered, attend industry gatherings and visit with all of my friends.



So for now I will only say “**Magkita Tayo,**” “**Sampai Jumpa Lagi,**” “**แล้วพบกันใหม่**” and “**再見**”.



# PIRACY KILLS INDUSTRY



## Neil Gane

GENERAL MANAGER - CAP



### PHILIPPINES

This quarter has seen a number of promising developments in the Philippines. In early April the **Intellectual Property Office of the Philippines (IPOPHL)** and **AVIA formally signed an MOU** with objectives and scope of cooperation to include:

- a) developing a framework which provides an **effective piracy monitoring** and **rolling site blocking process** and
- b) developing mechanisms and channels aimed at sharing and exchanging relevant information in order to **prevent and suppress online piracy** in the Philippines.

Then on the 14th April, **IPOPHL**, the **National Telecommunications Commission (NTC)** and the major **ISPs** have agreed to sign a MoU for an **administrative site blocking** process. Participating ISPs included Globe Telecom, Inc., Smart Communications, Inc., PLDT, Inc., Sky Cable Corp., Converge ICT Solutions Inc., and DITO Telecommunity Corp. The legal basis of the site blocking MoU is referenced in IPOPHL Memorandum Circular 2020 (049) and specifically Rule IV Section 6 (f). This memorandum circular was passed in December 2020 following a series of submissions and public forums wherein AVIA CAP pushed for an amendment to the definition of “pirated goods” to ensure that IPOPHL could take action against piracy streaming/torrent sites under their revised rules and regulations.

In addition to the MoU, site blocking has also been included within the **Congressional IP Amendment Bill**. This follows a series of Congressional committee hearings throughout March and April in which CAP was invited to present (as a private sector resource) on the efficacy of global administrative site blocking protocols. It is encouraging that there are currently a number of Congressional representatives who are sincere champions of the Filipino content industry.

Disappointingly the consolidated House Bill didn't make it to second reading and committee discussion before the calendar recess. The House and Senate reconvenes in late May when plenary sessions and voting will take place and the consolidated House Bill will be introduced. A Senate counterpart Bill, authored by Senator Juan “Sonny” Angara, is also expected to be filed when the Senate reconvenes.

### THAILAND



Last year, Thailand's State Council, upon reviewing the **Copyright Amendment Bill** passed by the House of Representatives, disappointingly removed the site blocking provisions in section 43/11 because it was deemed too similar to section 20 of the Computer Crimes Act (CCA). This was unfortunate as site blocking under the CCA has proven to be generally ineffective as a site blocking process.

The Copyright Amendment Bill is currently before the Chairman of the Copyright Ad-Hoc Committee, with the Committee now accepting submissions from industry. In May, AVIA sent a submission to the Chairman of the Copyright Ad-Hoc Committee which focused on the **inefficiency the site blocking process** under the CCA and the **benefits of including site blocking provisions within the copyright statutes**. The submission also incorporated a recommended change to the section 43/11 language. After the submission period has concluded, there will be a public hearing (date yet to be confirmed) after which the Bill will be tabled for the Third Reading before being sent to the Senate. At that point only clauses that have been reserved for ‘motion to amend’ will be reviewed.

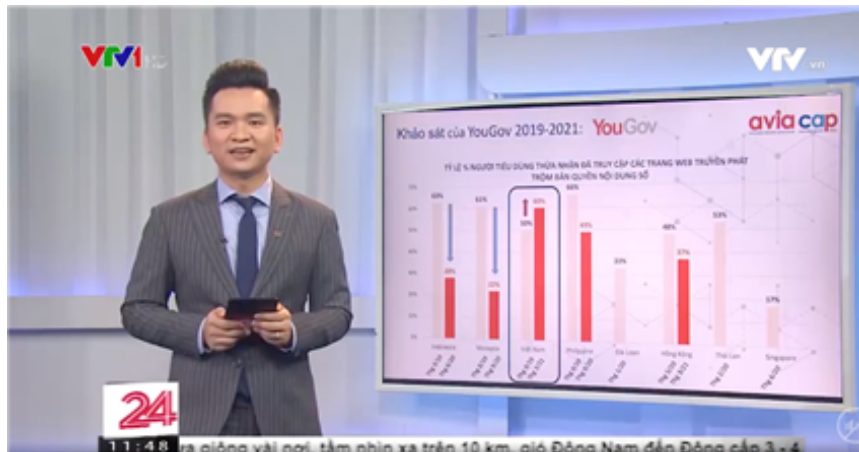


## VIETNAM

In April CAP presented at the US Government hosted **Digital Piracy Workshop** for Vietnam's **Ministry of Public Security (MPS)**. This was a three day government-to-government workshop with only one session represented by the private sector. The focus of the CAP presentation was the high level of online piracy in Vietnam and the need for both criminal enforcement and an effective site blocking regime. Upon request of the USE, the Indonesian and Malaysian SB case studies were used by way of example of what can be achieved in Southeast Asia. During the presentation the **need for legal clarity** was reiterated as regards three current pieces of legislation that implied or suggested that ISPs could be obligated to block access to pirated content, namely article 16.3 of the Information Technology Law 2006; article 5.3 of the Joint Circular No. 07/2012; and article 21 of the Cybersecurity Law 2018.

The in-person workshop was well attended with forty four (44) MPS senior officers from cybercrime units, economic police, economic security at both central (federal) and provincial (state) levels, and MPS institutions. Most of the provincial cybercrime units are newly established this year, except the one in Hanoi. Representation was from Hanoi, Quang Ninh, HCMC, Danang, Lang Son, Quang Binh, Can Tho, Hue, Hai Phong, and Bac Ninh.

CAP is also continuing to engage with FBI, DOJ and State Department representatives from the US Embassy (Hanoi) in efforts to encourage the Ministry of Public Security to start taking **criminal enforcement actions** against the VN based operators of the more egregious websites and apps.



The latest YouGov findings for Vietnam were released and generated substantial local media interest and coverage. Of Southeast Asian countries being monitored, Vietnam now has the **highest levels of digital piracy**, with **60%** of respondents either **use piracy streaming or torrent websites** for TV shows/video or for premium content. **More than half** (59%) of pirated content consumers have **cancelled their subscription** for paid content (international streaming services).

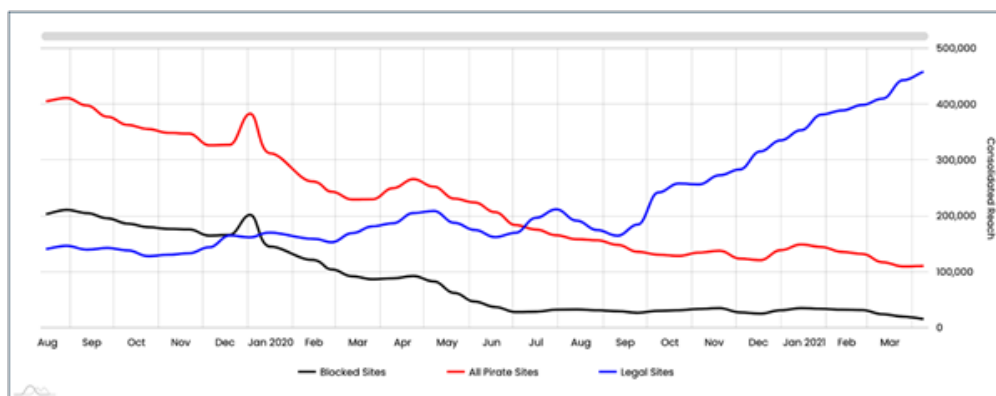
Streaming piracy has actually increased from 50% as recorded in the September 2019 YouGov survey. Vietnam is the only country surveyed in Southeast Asia which has shown an increase in streaming piracy.



## INDONESIA

Indonesian piracy website traffic **continues to fall**, with consolidated reach per million for all piracy websites now sitting at approximately 110,000 per million. When first analysing piracy traffic in August 2019, the overall traffic levels showed that visits to piracy websites was representative of 5.19% of ALL website visits in Indonesia. Current data suggests website piracy is now representative of just **0.71% of website traffic**. A substantial reduction. Conversely, we continue to see large gains of legitimate website traffic at roughly 4x piracy traffic levels.





**Mr Hermawan Sutanato**, the COO of Vidio, kindly engaged in an “In Conversation” session with me during CAP’s recent ‘Piracy Over the Top Summit’, where he spoke about the **Video Coalition of Indonesia’s (VCI)** anti-piracy efforts and its’ impact on legal platform revenues . The 20 minute session can be found [here](#).

Last November, the **Indonesian Cyber Crime Police** arrested the owner/operator of the **Duniafilm21** network of sites. The arrest was made in Jambi which is on the east coast of central Sumatra. The originating complainant in this case was made by PT Visinema Pictures, a member of the Video Coalition of Indonesia (VCI). In early May the defendant, Mr. Aditya Ferbando, was convicted by the Jambi District Court for **offences under the Copyright Act and Criminal Code** and sentenced to a 14 month custodial sentence. Police inquiries against other members of the Duniafilm21 network continue.

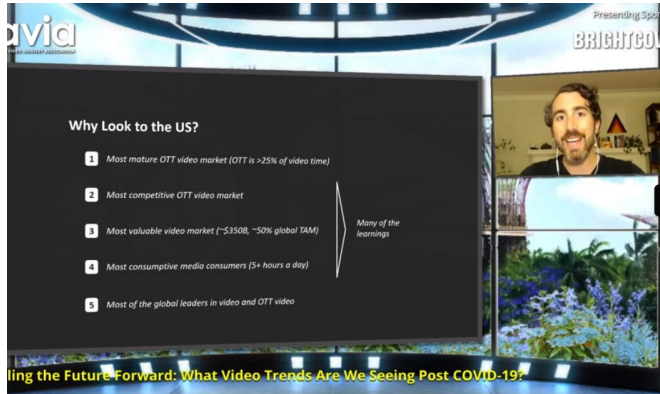
## REGIONAL MALWARE STUDY

A comprehensive malware/piracy study focusing on Vietnam, Philippines, Thailand, Hong Kong and Singapore is underway and expected to be completed in early June. The raw data collated by YouGov is currently being analysed by Dr Paul Watters, an academic who has worked with the content industry before when analysing piracy websites and high risk advertising. The academic paper will be appropriately translated and shared with government, industry and media. The initial findings are interesting:

- o Online consumers in the majority of countries surveyed (4 out of 5) were of the view that visiting a piracy website presented the highest risk activity for a malware attack.
- o 38% of households in Vietnam had experienced a malware attack (not necessarily linked to piracy). This compared to 36% of households in Thailand, 34% of households in Vietnam, 28% in Singapore and 22% in Hong Kong.
- o The awareness of malware in general was quite high, but this did not necessarily correlate to safe browsing decision making.

Q1. AWARENESS OF MALWARE	HONG KONG	SINGAPORE	PHILIPPINES	THAILAND	VIETNAM
Bots	31%	35%	39%	42%	34%
DDOs attacks	25%	26%	20%	29%	33%
Ransomware	58%	52%	29%	20%	52%
Remote Access Trojans that steal private and financial information	66%	47%	48%	42%	50%
Spyware that remotely activates and records via a computers video and audio functionality.	33%	55%	51%	45%	51%
None of the above	16%	26%	24%	22%	13%
Base	1080	1062	1103	2062	1100

AVIA had a very busy second quarter of the year, hosting 3 events these past months. Kicking off the conference calendar was our annual **OTT Summit**. This year's event welcomed almost 1000 delegates and industry leaders across the four-day virtual conference. AVIA also had the opportunity to host some of our Singapore based members at a post event luncheon at the Grand Hyatt.



*Matthew Ball, Epyllion Industries*

Opening the OTT Summit was the streaming analyst **Matthew Ball**, Managing Partner of **Epyllion Industries**. In his session he highlighted that **new subscriptions** continued to dramatically **outpace churn** and **content** was clearly the **key differentiator**. And while content was king when it came to subscriber acquisitions, as a market matures it exhibits an unmistakable preference for local content. "The OTT video industry is ultimately about content and the ability to create hit content is not equal," added Ball.

And putting the consumer at the heart of everything was key, especially when it came to content strategy. For **Kranti Gada**, COO of **Shemaroo Entertainment**, their strategy was two-fold, with differing content to acquire consumers, and to keep them on the platform, as content challenges to fulfil consumer needs remained

However, addressing and monetizing these consumers remains the big question for **premium video advertising**. While OTT and Connected TV have grown exponentially both in volume and share, there is still a lot of education to be done as there is a lot more diverse ecosystem in TV now. Shared **Anita Munro**, Chief Investment Officer at **Mindshare APAC**, understanding consumption, understanding audiences and knowing where viewing is moving to is key to creating more seamless consumer journeys and more immersive content experiences.



*Clockwise from top: Tom Dover, Xandr, David Sky, True Digital, Jennifer Chase, Mediacorp, Anita Munro, Mindshare*



At the **Future of Video India** conference, industry leaders remained more upbeat on the potential for growth despite a painful 2020 which had seen a 25% drop in TV advertising revenue.

**Mihir Shah**, VP, India, at Media Partners Asia (MPA), predicts that in the next 5 years, with every new incremental dollar in the region, India will have 35% share, almost evenly divided between television and online video. And with more than 60 online video services in India, the total addressable market will continue to expand.

**Sunil Rayan**, President and Head of Disney+ Hotstar, (pictured, left, with **Louis Boswell**, AVIA) is eyeing this local expansion as their next stage for growth, primed at developing their product for India, with pricing and content made for the local market. As India is a mobile first market which drives individual viewing, while OTT and TV is not a zero sum game, OTT content needs to be far more engaging for individual viewing, shared Rayan.







*Vanita Kohli-Khandekar, Business Standard with Monika Shergill, Netflix*

And as the market where the next billion consumers of video will come from, **Archana Anand**, Chief Business Officer of ZEE5 Global summed it up best when she said, “It is the decade of video.”



The **Philippines In View** seminar held on 18th May brought together more than 700 industry delegates to discuss the state of the TV and video industry in the archipelago country with over 7000 islands. Some of the industry luminaries present include **Manuel V Pangilinan**, Chairman, President and CEO of PLDT, **Ernest Cu**, President & CEO of Globe and **Dennis Anthony Uy**, Founder & CEO of Converge ICT Solutions.

Despite the major changes in the media industry over the last year, industry leaders remained positive and TV continued to show resilience. According to **Leo Uy**, Head of Research, BusinessWorld, despite total tv ad spend shrinking by a slight 4% year on year, digital video ad spend actually rose by 4.8%. Pay TV subscriptions have also increased and the roll-out of digital terrestrial television (DTT) continues to progress. OTT adoption is also expected to continue rising even after the effects of the pandemic.

**Robert P. Galang**, President and CEO, Signal TV and TV5, shared these sentiments as well. Galang expects growth for both Free and Pay TV in the next 5 years, as well as with DTT. While continued consolidation will have an impact on Pay TV, Galang still believes it is a strong proposition and the move to digital will provide an even bigger market for Pay TV.



*Giang Nguyen, The TradeDesk, with Marilyn See, GMA*

This move to digital has also been a large part of Globe's transformation through the decades. In the keynote conversation with **Ernest Cu**, President & CEO of Globe, Cu shared that it was part of Globe's purpose to make people's lives better and solve everyday problems in a digital way. And while streaming now dominates the entertainment landscape, the pandemic also brought about dramatic changes in consumer habits and a need for new lines of services. “We live by the adage, if we don't disrupt ourselves, somebody else will. . . the other alternative is to go away and be obsolete,” summed up Cu.

This focus on local content is also what drives the content platforms. **Monika Shergill**, VP of Content for Netflix India, shared that premium storytelling was a new space in India, as Indian audiences were open to experimentation and yet gravitating towards highly local tastes. “Our job and our passion is to find. . . the untold stories from India and to become the service of choice for Indians in India. . . and in different parts of the world,” added Shergill.

The growth in OTT has also made Philippines the most attractive market for OTT advertisers in Southeast Asia, with the highest advertising attractiveness index, according to a recent report by The TradeDesk and Kantar. **Marilyn See**, SVP and Head for Digital Publishing and Digital Advertising, GMA New Media, also said that spend on YouTube has been moving to OTT inventory, and it was a matter of time before OTT revenues can outpace TV ad spend.



*Ernest Cu, Globe, with Louis Boswell, AVIA*



# MEMBERS' VIEWS

## *In Sync: Content + Services + Devices*

*by Pankaj Kedia, MD, Emerging Markets, Dolby Laboratories*



The entertainment experience is undergoing rapid transformation and **premium entertainment experiences** continue to become more and more **mainstream** with the release of new devices, services and titles. Experiences that were exclusive to the cinema or required top dollars to set up in the living room are now available at easy to access price points and form factors like smartphones, tablets and connected TVs.

Consumer devices have evolved very significantly over the past few years in terms of the audio and video experiences they are capable of delivering. Today there are more UHD/4K TVs being shipped than non-UHD TVs. And these TVs are now capable of delivering **HDR videos** that can display **ultra-vivid images** with incredible details. Smartphones come with HDR-capable OLED screens and **immersive audio** capabilities to deliver spectacular experiences on-the-go. Headphones are equipped with head tracking technology to improve positioning of sound. Data networks and connectivity continue to evolve; **5G** is now **transforming** both the **delivery and type of entertainment content** being delivered. These enhancements are now becoming available in devices at mainstream price points and accessible globally.

Today devices are being upgraded every 18-24 months, to provide better screen resolution, video definition and sound quality. The recent **Wakefield global consumer research** across key markets, conducted during the pandemic revealed that in some markets up to **96% consumers** had recently upgraded or were **planning to upgrade their devices** that they consumed entertainment content on. Also, a recent consumer research by CMR in India showed that for the first time, consumers were **prioritizing audio quality** as one of the most important factors in their next smartphone purchase – over camera and battery life. The entertainment experience is becoming more important than ever before to consumers.

With the pandemic, people are spending more time at home as working remotely and staying indoors have become the new norm. With these changing times, the content consumption behavior of consumers has also witnessed an exponential change as the homebound work & leisure economy has led to a **significant rise in online content consumption**. People are consuming content **across screen sizes and devices** including smartphones, tablets, laptops, or televisions. People are consuming more content whether it is music, episodic content, gaming, podcasts, or even UGC.

This increased content consumption on more capable devices is also leading to an increased demand for content with higher audio video quality. The Wakefield study also revealed that in some markets up to **90% people had increased their spending on entertainment content**, by up to 48% in actual subscription costs. And also up to **94% were willing to spend more** for a premium subscription for enhanced audio and video quality.

To continue building on this momentum and growth in entertainment content consumption and to ensure utmost consumer delight, it is essential for the confluence of **content + service + device** to evolve together. It is imperative for brands to provide solutions across device categories to win consumers' attention. Having a robust content strategy and working together with all players in the ecosystem in better alignment is critical. True innovation will emerge with **content leveraging on technology** as devices continue to evolve and improve rapidly.

# How Telegram is Fuelling Streaming Piracy

By Avigail Gutman, VP of Intelligence & Security Operations at Synamedia



The popular messaging app, **Telegram**, is becoming the **leading source of pirated content**. Users of the platform, which provides end-to-end encryption, can conceal their identity to share texts, videos or other files. In January 2021, it was the most downloaded app across the App Store and Google Play with 63 million downloads and 500 million monthly users.

Telegram allows pirates to disseminate information easily to huge, encrypted private chat groups - as large as **200,000 people** - and its channels can attract millions of subscribers.

From new releases to live sporting events, pirates have circulated, exchanged and sold illegal videos on Telegram. Analyst firm Nera Consulting places the global TV industry's **revenue losses** from digital piracy between **\$39.3 to \$95.4 billion per year**, while a global study conducted by Ampere Analysis for Synamedia found that sports streaming piracy alone is worth **over \$28 billion**.

**Synamedia** has been fighting piracy for decades, providing services and technology to protect \$70 billion in operator revenue every year. By adopting an **intelligence-first security model**, marrying the best human intelligence with cutting-edge cybersecurity and AI technologies, we have disrupted pirates and brought many to the attention of officials.

To tackle streaming piracy, we need to map out the pirate ecosystem and watch every move pirates make.

## MASTERS OF DISGUISE

With no embedded player inside the platform, pirates use Telegram to distribute text and M3U links, and to upload videos for free to Telegram's hosted cloud services.

Pirates hide key words relating to the event they are stealing or use code words to embed references to new channels inside their messages.

## MASTERS OF STRATEGY

Pirates act in real-time. Minutes ahead of live events, they will proliferate new channels on Telegram with links.

They have back up channels ready to switch up at a moment's notice - sometimes pre-warning consumers which channel to use should the first pirated live stream be removed. They even have their own 'lookouts' for monitoring during an event. We saw a case where a streaming pirate changed the video name midstream due to a tip off from others in the chat group.

## JUMPING SHIP

Pirates will flag that a Telegram channel has been disrupted and distribute guidance on how to follow a new one. They also encourage consumers to migrate to other sites, providing links to the open web or to other platforms.

## STEALING THE STREAM

Pirates also offer OTT subscribers' stolen credentials, pirated APKs, and hacked IPTV emulator channels which give consumers a link to live channels without the need for a set-top box.

## PLAYING THE SYSTEM

Taking down channels on Telegram is possible. But, even if a content owner has a relationship with Telegram, it usually takes a minimum of four to six hours to take effect, presenting **a huge problem for live events**.

Streaming pirates have sophisticated businesses, using the latest technologies and legitimate cloud providers to host their services. Fighting streaming piracy requires solutions that **demotivate pirates at every link** of the video distribution chain. Building an **anti-piracy strategy** requires a painstaking, forensic, **intelligence-led approach**, mapping information in multiple layers to cross-reference data, spot behaviour patterns and understand trends.

And to win this battle, the media industry needs to **collaborate** with tech providers, governments, regulators and law enforcement bodies. It requires governments to mandate the use of technologies such as **watermarking** and introduce **tougher legal penalties**.

As well as deterring and disrupting piracy, using a model that **incentivizes viewers** of pirate streams to move back to **legitimate services** is important. With an appealing mix of access and payment models, operators can encourage consumers to pay for legitimate services instead.

## Member Reports:

The following member reports are now available at [avia.org](http://avia.org). Please register at our website for access.



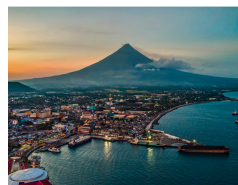
FIGHTING PIRACY  
ACROSS THE GLOBE:  
SPOTLIGHT ON  
SOUTHEAST ASIA  
Threats, Analysis & Action Items

It's smarter. It's safer. It's VO.



avia

PHILIPPINES  
IN VIEW 2021  
EXECUTIVE SUMMARY



## New Members:

AVIA is only as strong as its members. We want to appeal to all parts of the video ecosystem and we are delighted that in the last quarter we have been joined by the following companies:



## Updated Event Dates:

<b>AVIA TechTalks</b>	<b>8 July</b>
<b>Vietnam in View</b>	<b>8 September</b>
<b>State of Piracy Summit</b>	<b>8 November</b>
<b>Asia Video Summit</b>	<b>8 - 11 November</b>



## Contact Us:

We want to hear from you. Please get in touch and let us know what you think:

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