

JUNE 2025

ASIA VIDEO PULSE

THE NEWSLETTER OF THE ASIA VIDEO INDUSTRY ASSOCIATION

UPCOMING EVENTS

State of Piracy Summit

1 September

Jakarta, Indonesia

Archipelago Video Summit

2 September

Jakarta, Indonesia



A NEW ERA OF COOPERATION

How can an industry be consolidating and fragmenting at the same time? It's a paradox at the heart of the video and broadcasting landscape in Asia today—and increasingly, around the world.

On one side, we have long seen a steady wave of consolidation. Mergers, acquisitions, and alliances among major players continue to reshape the landscape. Companies are pursuing scale, efficiency, and breadth as competitive pressures mount. The logic is clear: growth, sustainability, and even survival now often require deeper integration, wider reach, and stronger brand presence.

This dual dynamic—consolidation at the top, fragmentation across the ecosystem—has reshaped how we operate. It has blurred traditional boundaries and roles. And it has introduced a layer of complexity that can feel, at times, disorienting.

But amid all this flux, there is another quieter trend emerging—one that we believe deserves greater attention: the return of cooperation.

For a time, streaming appeared to be a zero-sum game. Platforms competed for exclusive rights, for subscriber dollars, and for attention in an increasingly saturated digital environment. Vertical integration became the dominant strategy: own the content, own the distribution, own the relationship with the viewer. In such a model, there seemed little room—or need—for horizontal collaboration.

But that model is evolving.

In reality, even the most vertically integrated services are part of a broader ecosystem. As competition intensifies and the costs of acquisition and retention rise, many are realizing that success doesn't come from operating in a silo—it comes from building strategic alliances. From bundling content and services; from co-marketing; from shared technology infrastructure; from cross-platform discoverability; from leaning into the very partnerships that once defined the traditional TV model.

Whether it's telcos partnering with streamers, broadcasters collaborating on content production, or regional players teaming up for rights acquisition, there is a growing recognition that collaboration can create more value than competition alone. It's not about turning back the clock—it's about evolving forward with a new kind of cooperative mindset.

Increasingly, streamers themselves are beginning to cooperate with one another—forming partnerships to deliver bundled offerings that are bigger, better, and more valuable for consumers. These bundled services are not just about driving subscriber growth; they are about increasing retention, expanding reach, and offering customers greater convenience and choice in a fragmented digital world. It's a pragmatic response to platform fatigue and escalating customer acquisition costs—and it signals a shift in mindset from isolation to interdependence.

This trend extends beyond streamers. Across the industry, telcos are working with OTT players, platforms are opening up to third-party services, and distributors are striking cross-platform alliances. What's emerging is not a return to the old model, but the formation of a new one—based on cooperation, not consolidation alone.

Why is this happening now? Because the industry is beginning to acknowledge a hard truth: no single player, no matter how dominant, can meet all the needs of a rapidly diversifying and digitally empowered audience. The market is too complex, too fast-moving, and too competitive for any one company to thrive alone.

That's why cooperation matters more than ever. It allows companies to combine strengths, share risks, and build better, more resilient propositions. It enables experimentation, innovation, and scale—without requiring vertical ownership of every link in the chain.

Yes, challenges persist. Competition for attention remains intense; business models are still evolving; regulatory and operational complexity continue to increase – issues AVIA is very focused on addressing. But these challenges also create the conditions for partnership.

At AVIA, we believe the next phase of growth in our industry won't be defined solely by who gets bigger or faster—but by who is willing to work together to create real, lasting value.

Louis Boswell

UPCOMING EVENTS

Northeast Asia Video Summit

28 October

Tokyo, Japan

Asia Video & OTT Summit

3-4 DECEMBER

Singapore

POLICY MATTERS

CLARE BLOOMFIELD

CHIEF POLICY OFFICER

It seems that the only constant in the APAC regulatory landscape, as of late, has been change, whether observed through a subtle ripple or a more significant whirlwind. As the second half of the year unfolds, with Southeast Asian governments having firmly established their positions, momentum has been steadily building, alongside a growing concern among governments, focusing attention on the need to regulate online platforms and the digital domain, which in turn inadvertently potentially impacts the Online Curated Content (OCC) industry. The recurring challenges are not new, but they have become more pronounced as the regulatory emphasis continues to shift toward seeking a balanced or nuanced approach towards online safety and child protection concerns in Indonesia and Malaysia, the pursuit of greater local jurisdiction over online content on digital services such as in the Philippines, and plans to introduce regulations to encourage generative AI such as that in Hong Kong. AVIA continues to monitor these developments closely, working with members actively to advocate for the betterment of the industry.

INDIA



*Clare Bloomfield with Abhay Shanker Verma,
Principal Advisor, (Broadcasting & Cable Services),
TRAI*

AVIA was delighted to attend India's inaugural World Audio Visual Entertainment Summit (WAVES) 2025 in Mumbai in May. This, along with the opportunity to engage in a policy-oriented dialogue with a Principal Advisor from the Telecommunications Regulatory Authority of India (TRAI) during our annual Future of Video India event, made our trip a fruitful one. In various discussions conducted during these events, it became evident that there exists a necessity to “**level the playing field**”, although, at this juncture, the implications of that remain ambiguous.

Although things have been relatively quiet since, the draft **Digital Personal Data Protection (DPDP) Act Rules** remain under consideration. Given this current pause, AVIA felt it was important to join forces with the US-India Business Council in April and other industry associations in a joint letter to the Ministry of Electronics and Information Technology (MeitY) to emphasise some of the points made in our earlier submission. As we understand it, MeitY may not publish the Rules for a couple of months, which provides us with some time to encourage India to align with global best practices.

Elsewhere, the Ministry of Health and Family Welfare (MoHFW) recently conducted a discussion regarding the draft **Cigarette and Other Tobacco Products Amendment (COTPA) Rules 2024**. This discussion involved industry associations and stakeholders from the OCC industry and may be the final consultation held by the MoHFW. AVIA, along with other associations, is keen to ensure the Ministry of Information and Broadcasting (MIB) are also engaged in discussions with the MoHFW to devise a practical solution for implementation by OCC platforms. As always, AVIA will continue to monitor this as it develops to ensure that the final outcome does not impose undue burdens on our members whilst also delivering a high quality consumer experience.

INDONESIA

The highly anticipated **Child Protection Regulations** were finally issued on 27 March, and the wording in the regulation indicates that it applies to all **Electronic Systems Operators (ESOs)**, giving them a wide ambit beyond the curated content industry to include other digital platforms. Whilst there is a 2-year transition period until March 2027, before compliance is expected and the detailed implementation guidelines still need to be issued by the Ministry of Communications and Digital Affairs (Komdigi), thus far, the regulations are relatively light-touch and some of our concerns, which we raised in previous consultations and focus group discussions, appear to have been taken into account. The key requirement will be for ESOs to self-assess the level of risk to children, based on a number of different categories such as their ability to access harmful content, risk of addictive behaviour and the ability for users to contact minors on the platform. Based on these criteria, we assess that OCC users will likely fall into the low-risk category, with limited obligations. The key issue, which will require further clarification going forward, revolves around the issue of age verification. Currently, it appears that the regulations place significant emphasis on obtaining active parental consent for children to access online services, with clear age limits outlined for varying levels of access.

HONG KONG

The balance between **copyright protection** for rights holders and the capabilities of generative AI has been a contentious issue in numerous developed markets, and Hong Kong is no exception. The introduction of a planned amendment to the **Hong Kong Copyright Ordinance** in 2024, which aims to establish a **Text and Data Mining (TDM)** exception, presents a significant challenge for rights holders. This is primarily due to the absence of a technological opt-out mechanism that allows for the exclusion of their works, thereby imposing an undue burden upon them to formally opt out, or indeed be able to rely on any such opt-out. Such a process is fundamentally at odds with the primary tenet of copyright law, which affirms the exclusive right of an author to authorise the use of their creations. Furthermore, the proposed safeguards may prove inadequate and do not sufficiently support rights owners as well. AVIA is working with interested local members to engage the Legislative Council and reiterate these concerns, while lending support to other industry associations that will be doing the same.

MALAYSIA

Similar to Indonesia, there has recently been a focus on **online safety and content**, with the Communications and Multimedia Content Forum (CMCF) assigned the task of updating the **Content Code** by the end of the year. AVIA participated in the public consultation, which concluded at the end of May, emphasising that the published OCC Guidelines from 2023 have been sufficient for the industry and serve as a role model for the region, as the document was produced with industry collaboration. Furthermore, AVIA emphasised that any future legislation that will be tabled should avoid overlapping with the existing content code and OCC guidelines as well.

It was interesting to note that in the Philippines, shortly after Chairperson Lala's resignation as a result of a mandatory Cabinet reshuffle, the **Movie and Television Review and Classification Board (MTRCB) Charter** passed its final reading in the Philippine Senate, aiming to strengthen and expand its mandate to include oversight of content on OCC services. However, this Bill has to now go to the House of Representatives and be passed by them, before any change to legislation is agreed. After concerns were raised by local entities on this potential expansion of role, the MTRCB reiterated in a public statement that it shall only initiate or request a reclassification from an OCC service following a screening, and will do so only when it is deemed necessary to protect younger audiences from content deemed obscene, immoral, or violent. Much remains to be done in ensuring that whatever comes next in the legislative process does not result in the introduction of unwelcome and burdensome regulations.

THAILAND

Following a consultation on the **Draft Film Act** in August 2024, it was approved in principle by the Cabinet at the end of March this year, before being sent to the Office of the Council of State for review. By the end of May, an updated draft was made available for public feedback. Based on our initial assessment of this latest draft, it appears that the section on the **Film Industry Council** will become a separate act. However, of potential concern is that they have retained and refined aspects of the draft regarding content that will need to be rated by a self-regulating certifier. This self-regulating certifier must register with the central registrar, and the rating must be conducted in accordance with the standards and details of the content rating system established by the Minister, which has yet to be announced. AVIA will continue to emphasise that employing a standard classification solely for Thailand will present unintended challenges to regional and international OCC services and, more importantly, the growth of Thailand's content industry.

FORWARD LOOKING

Although we are now hitting the summer break, there remains many outstanding issues which will continue to keep us occupied, especially as the pace of regulatory change shows no signs of slowing and the next three months promises to be a dynamic period in the region. As always, AVIA will continue to monitor these developments as they unfold and ensure that our members' voices are heard in an increasingly complex regulatory landscape. Moving forward, it is evident that the only thing predictable about the regulatory environment is just how unpredictable it continues to be. Looking forward to the second half of the year, AVIA will be hosting regional events, such as Archipelago in View in Jakarta in early September, giving us the opportunity to engage with regional regulators. Throughout all these engagements, we continue to advocate for nuanced approaches to regulation, whether for pay TV or OCC, to ensure things remain as light-touch and flexible as possible.

UPCOMING

Events:

-
- 1**
September
- State of Piracy Summit**
Jakarta, Indonesia
-
- 2**
September
- Archipelago Video Summit -
Indonesia, Malaysia and Philippines**
Jakarta, Indonesia
-
- 28**
October
- Northeast Asia Video Summit -
Japan, Korea**
Tokyo, Japan
-
- 3-4**
December
- Asia Video and OTT Summit**
Singapore

**Dates may be subject to change*

**MORE
INFORMATION**

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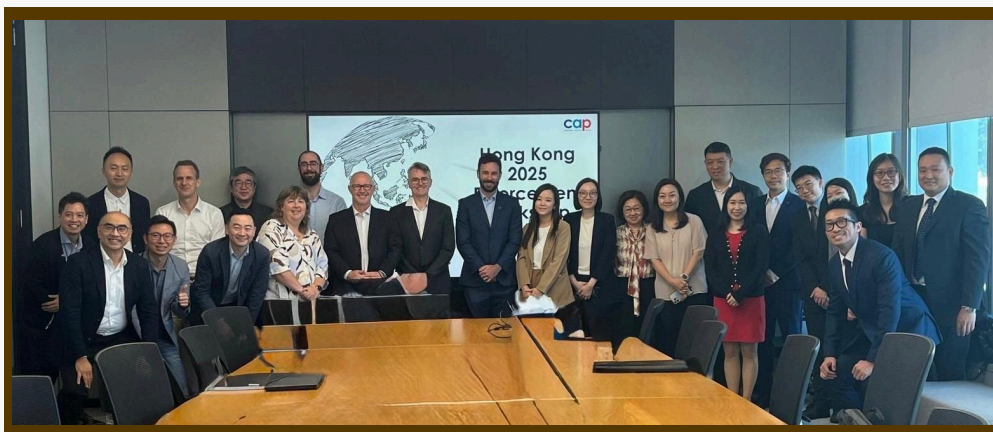
MATTHEW CHEETHAM

GENERAL MANAGER

In 2016 cybercriminals linked to North Korea nearly stole one billion dollars (one billion dollars!) from the Bangladesh Central Bank's account at the Federal Reserve Bank of New York. How? They used stolen credentials and infiltrated internal systems through a compromised printer and vulnerabilities in outdated software. The attackers didn't need to physically break in - they acted from within the bank's trusted network, issuing fraudulent transfer requests that nearly succeeded. One hundred million had been syphoned off before a typo in one transaction ("fandation" instead of "foundation") raised a red flag, stopping the imminent transfer of a further \$850 million dollars. The relevance to piracy and CAP? This is the type of vulnerability that consumers allow into their households and connected networks, including, potentially, government infrastructure, via unregulated and highly compromised Illegal Streaming Devices (ISDs), and this is the message that CAP has been informing governments of, ISDs are not just a piracy problem, they are potentially much much more damaging.

RESEARCHING AND TECHNOLOGIZING

In May, CAP formally released research revealing that popular ISDs in Taiwan not only enable rampant piracy but also pose **significant cybersecurity threats** to consumers and potentially national infrastructure. The research found that most ISDs are not only vulnerable to malware infections, but are in fact riddled with them. Furthermore, they can be remotely hijacked, putting users at **risk of identity theft, ransomware, and espionage**. Even more alarmingly, these devices could be exploited to form large-scale botnets capable of disrupting Taiwan's critical infrastructure through coordinated cyberattacks. CAP used this research as the basis of discussions with the Singapore government, where the ISDs subject to the Taiwan study are just as popular, as well as in workshops in Taiwan and Hong Kong. This message is resonating with governments and we will continue to push the concern that ISDs are more than a mere piracy problem.



Matt Cheetham with AVIA members at an enforcement workshop in Hong Kong, attended by local and international rights holders, and government officials.

Following on from our ISD research, in Q2 CAP also initiated a further round of research **“Assessing Fraud and Data Exposure Risks to Consumers from Popular Sites and ISD/Apps Across Asia”**. The purpose of the research is threefold: to evaluate a selection of popular websites, ISDs, and apps used across Asia for fraud and data exposure risks; to simulate consumer usage patterns via synthetic identities and track any unauthorised transactions or breaches, and to compare risks across countries and provide actionable findings for policymakers, banks, and consumer protection agencies. We aim to have this research ready for distribution in early Q3.

ENGAGING & OUTREACHING

In early May, CAP held its first platform Roundtable of the year with Meta at their offices in Singapore. As always CAP liaised with our members and Meta to identify and address issues of concern during the event. Meta also took the opportunity to inform us of the proactive steps they are taking to address piracy on their platform, noting that their particular focus for 2025 is **addressing ISD piracy**. They believe that machine learning is the best way to counter this form of piracy on their platform and they are developing a tool for this.

As part of this effort, following the Roundtable Meta asked CAP to liaise with its members to provide it with examples of ISDs which were then be fed into its system. In addition to our ongoing work with Meta, CAP are also working with **Google and Meta for Roundtables in July**. Throughout Q2, CAP also engaged with **regional e-commerce platforms**, including Lazada, Shopee and Carousell. Protecting member company content on these platforms will form a central part of CAP's work for the year.

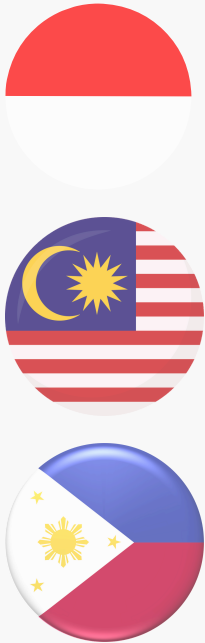
Engaging with governments around the region has been and continues to be a key component of CAP's work in APAC. In April we organised a meeting with **Infocomm Media Development Authority (IMDA)**, Singapore's telco regulator, to discuss the Taiwan research and its potential implications for Singapore. IMDA acknowledged the concerns and we are now working with them to set up follow up meetings in July with the cyber security agency to discuss the issue. We are also working with IMDA for them to facilitate a meeting with ISPs in Singapore the same week to discuss how to **improve current site blocking procedures**.



Pictured left to right: Clare Bloomfield, AVIA, Jiun-Yu Wen, Director General, Department of Planning, NCC, Matt Cheetham, AVIA

CAP also worked with local industry and government in **Taiwan**, including the National Communications Commission (NCC) and Taiwan Network Information Centre (TWNIC) and **Hong Kong**, including Customs and the Intellectual Property Department (IPD), to publicise the need for **greater awareness of the risks of ISDs and the need for site blocking**. These issues also formed the basis of our presentation at a USPTO organised copyright enforcement seminar for APEC member economies in June.

ENFORCING & DISRUPTING



Indonesia has long been a mainstay of CAP's site blocking program in the region, with our primary means of blocking being referral of sites to KomDigi, the telco regulator. Changes in personnel and procedures at KomDigi required CAP to spend significant time working with our local consultant and KomDigi to ensure that our blocking program remained efficient and effective. In Q2 CAP also **extended our site blocking program in Malaysia** to include for the first time the blocking of live sports sites. This is a significant step forward for our Malaysia blocking program and we had to work extensively with KPDN, the Malaysian authority overseeing blocking, to ensure the sites referred were blocked. CAP also **initiated discussions with IPOPHL** in the Philippines to file site blocking referrals via their voluntary MOU processes and we hope to have sites blocked via this avenue in the near future.

As noted above, **addressing piracy on e-commerce platforms** has become a priority for CAP in 2025. After liaising extensively with our members on the key concerns and proposed solutions, CAP is now in ongoing discussions with Lazada, Shopee and Carousell to address the issue.



COLLABORATING



CAP worked with the Cable Broadband Institute in Taiwan (CBIT), the local industry association, to organise its enforcement workshop in May (pictured left) and will continue to work with them and the other local association, Satellite Television Broadcasting Association (STBA), to push our agenda.

As always, CAP also continued its regular program of Quarterly Reports and Meetings, with the next Quarterly Meeting likely to be held in July in Singapore, and we are looking forward to June when we will be holding our first CAP meeting in Europe for our many members based there.

COMMON CHALLENGES IN A FRAGMENTED INDUSTRY FOR 2025

Despite its diversity, the video industry faces shared challenges that require collective solutions. This is where AVIA plays a pivotal role, serving as a unifying force for the industry. Some of the key areas of focus include:

1

Engaging with Regulators

As the industry evolves, so too does the regulatory landscape. Policymakers across Asia are grappling with how to apply existing frameworks to new business models and technologies. For instance, questions around content quotas, licensing requirements, and taxation for streaming platforms remain hotly debated.

AVIA plays a critical role in engaging with regulators to ensure they understand the complexities of the industry. By providing data, insights, and a platform for dialogue, AVIA helps policymakers craft regulations that enable all parts of the industry to thrive. This is particularly important in Asia, where regulatory approaches can vary significantly from market to market.

2

Fighting Piracy

Piracy remains a significant threat to the industry, undermining legitimate businesses and robbing content creators of fair compensation. The rise of streaming has made piracy even more pervasive, with illegal services often offering content at a fraction of the cost—or even for free.

AVIA has been at the forefront of anti-piracy efforts, coordinating industry-wide initiatives to shut down illegal services, raise consumer awareness, and promote the value of legitimate content. Collaboration with governments, technology providers, and enforcement agencies has been key to these efforts.

3

Supporting Advertising in Premium Content

Advertising has long been a cornerstone of the video industry, particularly for FTA broadcasters and, more recently, ad-supported streaming platforms. However, the shift toward digital has brought new challenges, including competition from social media and short-form video platforms.

AVIA advocates for the value of advertising in premium, long-form content, emphasizing its ability to deliver high engagement and brand safety. By working with advertisers, agencies, and platforms, AVIA helps ensure that advertising remains a viable revenue stream for the industry.

4

Engaging with Local Markets

Asia's diversity is one of its greatest strengths, but it also presents unique challenges. Global trends, such as the rise of streaming, often play out differently in local markets due to variations in consumer behaviour, infrastructure, and regulation.

AVIA's work in engaging with local markets helps the industry navigate these differences. Through events, research, and partnerships, AVIA provides insights into local trends and facilitates collaboration between global and regional players. This ensures that the industry remains responsive to the needs of audiences across Asia.

Future of Video India

2 May 2025

Trident, Bandra Kurla, Mumbai

INDIA: REVOLUTIONIZING VIDEO AND CONTENT FOR THE GLOBAL MEDIA AND ENTERTAINMENT INDUSTRY

The **Future of Video India 2025** conference, held at the Trident Hotel Bandra Kurla, and part of the inaugural World Audio Visual & Entertainment Summit (WAVES), brought together over 120 industry leaders, innovators, and policymakers to discuss the transformative trends shaping India's media and entertainment landscape.

Gaurav Banerjee, Managing Director & CEO of **Sony Pictures Networks India (SPNI)**, (pictured right) declared "... the days of mediocre content is coming to an end" while sharing his vision for the future of SPNI and how it is pivoting to become first and foremost a content studio. He stressed the importance of authentic, quality, and unique storytelling and how SPNI was shifting from a traditional pay TV business model to a more diversified content distribution strategy, leveraging both broadcast and digital platforms to maximize monetization and reach.



Kelly Day, Head of International & Vice President, **Prime Video** (pictured left with **Gaurav Gandhi**, VP, APAC and MENA, **Prime Video**), emphasized the importance of offering a wide range of content to cater to diverse customer preferences. "We want to be the first place that people think of when they want to watch something. . . This idea of offering the best and biggest service is at the core of what Amazon offers around the world," said Day.

Monika Shergill, Vice President - Content at **Netflix India**, also stressed the importance of creative excellence and innovation, with a commitment to fuelling emotional connections through bold and imaginative storytelling. **Sushant Sreeram**, Chief Marketing Officer at **JioStar**, (pictured right) similarly highlighted their platform's focus on emotional engagement, personalized content, and innovative monetization strategies to drive growth and retention. "An aspiration and ambition to get to 1 billion screens requires us to reimagine everything, from the way we market to our service and the content we offer," said Sreeram.



Clockwise: Vineet Rastogi, INVIDI, Luke Smith, PubMatic, Akila Jayaraman, JioAds, Ranjana Mangla, Sony Pictures Networks India, Ashwin Padmanabhan, GroupM South Asia, Bhavna Saincher, Samsung Ads India, Clem Birdsall, Publica by IAS, Saurabh Srivastava, Shemaroo Entertainment, Greg Ho, AVIA

The conference also focused on the future of premium video advertising in India, with panellists highlighting the transformative potential of CTV for advertisers. **Vineet Rastogi**, Director of Product - India & EMEA, **INVIDI**, said, "It is not a question of choosing between linear and streaming, it's about how to combine them." **Clem Birdsall**, Senior Publisher and Platform Director - APAC, **Publica by IAS**, also shared that programmatic buying offered more opportunities for advertisers compared to direct buying, which often has a higher entry threshold while **Luke Smith**, Senior Director - CTV & Online Video, APAC, **PubMatic**, opined that while TV has traditionally been effective for top-of-the-funnel brand advertisers, there are now unprecedented opportunities for all types of advertisers to leverage this medium.

[Full Press Release](#)

[Event Photos](#)

Future of Video India is proud to be part of **WAVES 2025**.

Archipelago Video Summit - Indonesia, Malaysia and Philippines

2 September 2025

Park Hyatt Jakarta, Indonesia



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Archipelago Video Summit

Northeast Asia Video Summit

Northeast Asia Video Summit - Japan, Korea

28 October 2025

Andaz Tokyo Toranomon Hills, Japan



Member Reports:

The following reports are now available at avia.org for download. Please register for an account on our website for access to these and more.



Watermarking

Choosing the Right Watermarking Solution:
How to Secure Video Content Without
Compromising Performance

White Paper

Friend™

Report / Release / Unperceptible

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Watermarking

10 Questions to Ask
Your Prospective Video
Watermarking Vendor

Friend™

Report / Release / Unperceptible

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2025 Upcoming Events:

State of Piracy Summit

1 Sep

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2 Sep

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28 Oct

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3-4 Dec

**Dates may be subject to change*



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