



TechMutiny

new thinking, new technology for the creative sectors
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www.techmutiny.net; Twitter: @TechMutiny; email: jaykaymedia@btinternet.com

N ews Analysis

Watching Apple Music's launch: Is it the melodies or the money that matter?

The long awaited Apple Music, the iPhone and iPad maker's move into the streaming music business, has finally arrived.

The service is scheduled to go live on 30 June. And the media frenzy surrounding its launch triggers questions about whether the music streaming business is about music or about money first and foremost.

Apple Music is the result of the computer giant's ambitions to own the world's largest digital music platform now that fans' love for Apple's iTunes, the world's

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largest music downloads store, is waning. Apple Music will be playable on all devices carrying Apple's iOS operating software. Some 1 billion iOS devices, including 74 million-plus units of iPhones and more than 21 million units of iPads, had been sold by this year's first quarter.

Available to customers as long as they keep paying their monthly subscription fees, Apple Music has been created after the US tech conglomerate acquired the highly acclaimed Beats Electronics, jointly owned by music executive Jimmy Iovine and rap legend Dr Dre, last year.

And the Beats go on

Beats Electronics included Beats Music, its founders' attempt to challenge the then and still music streaming market leader Spotify. But Apple CEO Tim Cook must have been so impressed with its quality, he agreed to pay US\$3bn for Beats Music and Beats Electronics' much coveted headphones manufacturing venture.

Among other services, including an apparent mean music discovery feature and alleged exclusive content, Apple Music subscribers will also have access to more than 30 million songs from major and independent labels.

Additionally, it offers Beats 1, an international live round-the-clock digital radio platform operating from London, New York and Los Angeles, led by former UK BBC Radio 1 DJ Zane Lowe.

But is Apple Music going to be the killer app that slays existing operators thanks to its existing dominance in the music downloads business with iTunes' estimated 800 million-plus subscribers?

Experts note that with more than US\$200bn in cash in its bank accounts, Apple has more than enough resources to put into its marketing campaigns to scare rivals out of existence.

Apple Music's competition

And some competitors have already gone on the defensive. Global market leader Spotify, the Sweden-originated venture offering 30 million-plus tracks in 58 markets, recently boasted it has 75 million active users, of which 20 million are paying the average monthly fee of US\$10.00. The remainder use the free ad-funded version, a business model Apple Music refuses to adopt.

With ambitions for a stock exchange listing, Spotify responded to the Apple Music news with the announcement of new investors. It has just completed a US\$526m fundraising round, including US\$115m from Nordic telecoms giant TeliaSonera for a stake of 1.4%, valuing Spotify at about US\$8.5bn.

Shares in Pandora Radio, the US' largest subscription-funded streaming service, began to plummet as investors feared it would lose customers to Apple.

Growth in the streaming market has soared high and quickly; it has become a gold rush, luring numerous prospectors in the struggling global music business. But IFPI, the global recorded-music trade body, reports that about 140 million people worldwide, including some 40 million paying subscribers, prefer to stream their music. This generated more than US\$1.6bn for the whole industry in 2014.

This also explains why US rap music mogul Jay Z, entertainment entrepreneur and Beyoncé's husband, was happy to lead a group of celebrity friends who spent US\$56m buying Aspiro, a Norway-originated high-fidelity streaming music service that operates TIDAL in 40 countries today.

Other high-profile internationally distributed rivals include Rdio (by Skype's inventors), and YouTube's Music Key.

Japan's Line, which operates the popular messaging app with nearly 700 million registered users, has launched Line Music aimed at music fans in Japan and neighboring Asian markets. Its current unique selling point is that it is making headway in the world's second biggest music market before Apple and Spotify.

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Of course, in any zealous business sector, there are casualties, such as Germany's Simfy, the UK's Blinkbox Music and the US' Grooveshark (which had in fact admitted that it had been operating an illegal service).

Deezer wants to grow the streaming pie

Deezer, the world's second biggest music streaming offering after Spotify, seems to have kept a low profile amid the spinning heads responding to the uncertainty Apple Music's launch might create.

With a catalog of 43 million songs, 30,000-plus music and talk radio channels and 26 million high-definition audio tracks and podcasts, it offers one of the most comprehensive content streaming services.

It expanded in the coveted US market early this year with the acquisition of Muve, part of AT&T subsidiary Cricket Wireless. And in 2014, it bought US podcast aggregator Stitcher to enter the country's major talk radio sector.

Tyler Goldman, Deezer's US CEO, tells TechMutiny the company has tried not to overreact and copy rivals' strategies in the expanding streaming sector by focusing its strategy on its customers, first and foremost.

Rivals might also say the same. But coming from the TV sector before joining Deezer, Goldman says he feels more objective about its growth approach.

"There seems to be a focus on who's getting a piece of the pie instead of creating the pie," he declares.

"With (streaming TV giant) Netflix, it focused on figuring out a whole new category in the TV space. HBO had done the same in the pay-TV sector, and Uber (taxi service app) has developed a new level of service that people are happy to pay for," he says. "Music has a lower perceived value, while experiencing large levels of consumption. And that is because, business-wise, there is a total lack of

creativity among services that are not close enough to their customers."

How about Pay As You Go?

Martin Rigby, co-founder/CEO of start-up Psonar, is also convinced that focusing on the customer first, before the money, is the only way to survive in the now aggressively competitive international music streaming business.

UK-based Psonar's pay-as-you-go model is targeting a world where you don't need a credit or debit card in order to enjoy the riches music streaming has to offer.

"Ten dollars a month subscriptions are not affordable to millions of customers around the world, while ad-funding can be interruptive and restrict your enjoyment," he explains.

"Pay-as-you-go gives music fans control how much they spend. If you look at the emerging economies, smartphone penetration is exploding, but while the consumers want access to music, they do not necessarily have bank accounts. This is a convenient way for them to pay and still make money for the industry."

Instead of focusing on annihilating your rivals, a flexible range of offers from the industry is the solution, he adds.

Rigby has major supporters for Psonar, which is in beta and scheduled for a commercial launch later this year, starting with Europe and the US, before a global rollout.

Universal Music Group has licensed more than 2.5 million tracks to the venture. Sony Music Entertainment and Warner Music Group are negotiating.

It has embarked on a £1m fundraising campaign for business development, including amassing £250,000 via crowdfunding on the Crowdcube website.

Meanwhile, the UK government's London Co-Investment Fund has committed to adding £100,000. In this industry, it seems music cannot do without money.

###

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Meerkat, Periscope peer over the precipice of live sports copyright storm

Meerkat and Periscope, the new category of mobile apps that allows users to live stream videos for others to watch in real time, are allegedly heralding a “new form of piracy.”

And their most vociferous critics are within the still conservative live sports sectors, which have always been cautious when it comes to new-tech adoption. Despite its successful use in tennis championships for over 15 years, several professional sports organizers remain wary of the much-admired Hawk-Eye ball-tracking tech.

Meerkat and its rival Periscope looks set to be even more challenging. They allow smartphone users to transmit any event live for their social media followers to watch for free. And organizers of major sports events, which broadcasters have paid billions for the exclusive live rights to, are none too happy.

Live-streaming iOS and Android apps are so new (Meerkat and Periscope only fully launched in March), there are no official forecasts of future growth rates nor predictions of the potential damage they could cause rights owners.

Price paid for sports exclusivity

But what we do know is that the US’ National Football League (NFL) received almost US\$40bn from the major US terrestrial TV and pay-TV networks, plus related media services, to cover the games from 2014 to 2022.

In 2011, NBCUniversal’s NBC and NBCSN networks agreed to pay US\$200m a year for North America’s National Hockey League (NHL) ice-hockey competitions until the season ending 2021. An additional C\$5.23bn (US\$4.25bn) is coming from Canada-based conglomerate Rogers Communications. That amount will cover the

matches starting last year until the 2025-26 season. There is a similar scenario in the United Kingdom.

The domestic TV rights alone to the English Premier League (EPL) soccer games cost about £5.5bn (US\$8.5bn) to Sky, BT and public broadcaster BBC from the 2016-17 season to 2018-19.

These expensive long-term deals, including digital-media rights, mean broadcasters are not keen to see their potential viewership dwindle just because another clever digital media idea has emerged.

Pay-per-view (PPV) subscribers paid about US\$100 each to view the boxing “fight of the century” between Floyd Mayweather Jr and Manny Pacquiao at Las Vegas’ MGM Grand Garden Arena on 2 May. That one fight alone generated an estimated US\$600m from PPV subscriptions to US cable networks HBO and Showtime, foreign broadcast rights, and ticket buyers at the boxing ring.

Yet, pundits believe rights owners could have made much more from the bout based on the numbers that paid nothing to see it live via Periscope.

The disruptive effect

Periscope, which Twitter acquired in March for a little under US\$100m reportedly, is said to have snapped up 1 million registered users in its first 10 days. Periscope’s heated competitor Meerkat, a start-up venture that has raised more than US\$18m, is claiming to have gained 2 million users by May.

Their ability to integrate live streaming into the Twitter feed has triggered feverish usage on the Twitter platform. Twitter, the company, has understandably cut off Meerkat from access to its “social graph.” This means Meerkat users will have to work harder to find their followers on Twitter.

Periscope, on the other hand, will have Twitter’s extensive international reach for marketing. Meerkat is currently on its own. The former enables you to save your live feed, the latter does not.

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Still, what are the prospects of the two rivals doing to live sports what the original Napster, Grooveshark, LimeWire, Megaupload, Sweden's The Pirate Bay, and Russia's VKontakte are said to have done to the decimated global music business by encouraging piracy with their technology?

HBO has complained about the piracy perpetrated during the Mayweather/Pacquiao fight because of the reported 10,000 who paid nothing to watch via Periscope.

The UK's EPL, which has worked with Twitter's six-second video loop platform Vine to prevent video rights infringement of its football games, is considering a similar tactic with live streaming apps. However, the EPL is also conflicted in case any crack down alienates fans.

The NHL has imposed an outright ban of the apps at its games, although it remains unclear how that will be enforced, and what it plans to do with its own Periscope account (@nhl).

And tickets and media passes to the US' National Basketball Association and NFL games prohibit live video shoots of any activities before, during and immediately after games.

Periscope's terms and conditions warn against copyright infringement with its technology, while Twitter already has the means to take down illegal videos delivered on its platform.

Authentic innovation

Live streaming apps might turn out to be gimmicks with a cult following. Watching a live event on a mobile device while on the move has its limitations.

But they have brought genuine innovation to digital media, which has been bombarded by Facebook, Apple and Google copycats during the last decade. Placing

video viewing via smartphones in consumers' hands is one thing. Doing so with live video broadcast is really taking things to another level. Others are likely to follow. A Delhi-based start-up in India recently raised US\$200,000 from angels for InstaLively (www.instalively.com) for Android devices.

How the sports sector embraces the technology will be interesting to watch. Cable TV networks such as the US' VH1 and UK mega fashion brand Burberry (and cinemas) have embraced it as another tool for engaging directly with fans.

Sports organizations, teams and regulators have always been suspicious of new technology 'interfering' with the game. It is only in the last couple of years that FIFA, the global soccer governing body, has been seriously considering Hawk-Eye for international matches.

It is being used as the "official goal-line technology" for the first time at a FIFA's Women's World Cup competition, which is being held 6 June to 5 July in Canada. It is also being tested for use at this year's Rugby World Cup in the UK this September.

But decisions about Meerkat and Periscope will need to be made sooner rather than later; today's digital natives might not have the patience to wait as long as the sports industries are doing for Hawk-Eye.

###

Telecoms giant Verizon gulps down AOL to boost its future in content and ad tech

It is hard to know whether content owners and creators should despair or be delighted, but the telecom juggernauts and their high-speed delivery tech systems are planning to take over. This was confirmed in May when US telecom goliath Verizon's proposed US\$4.4bn merger with AOL, one of the Internet generation's veteran

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web portals, went public. Pre-social media, the 32-year-old AOL Inc (as well as content-aggregating rivals Yahoo and Microsoft's MSN) spent millions on ad-funded online entertainment, news and free communication services like email to lure end consumers into accessing their then clunky Internet networks.

Internet access became cheaper and ubiquitous (3.2 billion connections worldwide today) and mobile phones (7 billion subscribers globally) got smarter (1.75 billion smartphone users). Growth in broadband Internet bandwidth, to handle fans' demand for the larger movie, music, and video games files, on mobile devices soared. And the Internet became key to businesses' standard strategies.

Then over-the-top content distributors and creators like Netflix, Hulu and Amazon Prime were able to use the Internet to deliver high-end TV and entertainment directly to viewers, who are becoming disillusioned with expensive pay TV packages from telecom-owned Internet service providers and cable operators.

That development seemed to kill telecom operators' ambitions to operate their own media and content distribution services.

What telecoms companies want

However, the tables turned again. Telecom companies realized digital content owners and distributors, including AOL, Hollywood and the music industry, needed their networks more than they needed content.

After all, traditional voice communications and data gathering have always placed telecoms in every home and office the world over. But as they still want to entertain their customers, they have been forming some formidable partnerships with content owners.

In the UK, BT Group is successfully challenging satellite-delivered Sky, Europe's largest pay TV operator, to compete for rights to the major live sports events and Hollywood blockbusters. BT is able to promise free TV entertainment to existing

and potential subscribers of its broadband Internet service. Meanwhile, to ensure it does not lose viewers to BT, Sky makes similar offers to its TV subscribers via Sky Broadband, which was created through a series of acquisitions.

Verizon rival AT&T has made a US\$49bn bid for DirecTV, the country's largest satellite TV group. Orange, France's largest telecoms operator, sees its entertainment service as key to its longevity.

Over the years, it has invested in, created and run a series of TV channels (Orange TV). It is a major mobile-music distributor. It is also an investor in streaming music platform Deezer and owns Dailymotion, the video-streaming platform.

Why AOL?

What has made Verizon's bid noteworthy is that AOL's content is secondary to the tech resources and intelligence the latter has been accumulating in recent years. AOL has a peripatetic history. One fiasco was its astonishing US\$164bn takeover of Hollywood conglomerate Time Warner in 2000. The two companies demerged in 2009. At least, their questionable ambitions created the world's biggest media-and-entertainment corporation and led to the first time Wall Street fully acknowledged dotcom businesses were here to stay.

But the New York Stock Exchange-listed AOL's value plummeted as it struggled to find a role in a world that now included Facebook, Twitter, Pinterest plus Google and its YouTube.

It started acquiring high-end online content and blog producers, including The Huffington Post, Engadget and TechCrunch, to reach consumers who knew nothing else apart from accessing the Internet for their entertainment.

Today, it also operates AOL On, its own online original-content entertainment channel. Last December, it acquired Vidible, a video-syndication platform. In April, it cemented a deal with NBCUniversal, the Hollywood movie and TV

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colossus, which will distribute content on AOL On mobile and TV apps. Additionally, they will co-produce web content for digital distribution.

But competition from the new social-media phenomena has restricted AOL's audience growth and impacted advertising revenue. Today, AOL's network of websites via www.aol.com has an estimated 200 million monthly viewers compared to Facebook's 1.3 billion monthly users.

Both are profitable but AOL reported revenues of US\$2.53bn last year compared to Facebook's US\$12.5bn and Verizon's US\$127bn.

AOL's market capitalization value is US\$3.94bn, Verizon's is US\$202bn, while Facebook boasts a valuation of US\$226bn.

When content owner becomes tech operator

To ensure future growth, AOL CEO Tim Armstrong decided to turn the company into an advertising tech expert. It delivered ads not only to its content websites, but also to other online publishers globally. Under the ONE by AOL tech platform, AOL Inc offers a one-stop shop of digital advertising support for brands and their marketing agencies internationally.

AOL's different tech services include Advertising.com (which serves ads to a network of more than 6,000 publishers' websites); Marketplace (an ad exchange platform); ADTECH (manages the distribution of display, video, mobile and rich-media ads); Adap.tv (a video-ad exchange platform that AOL bought for US\$405m in 2013); AOL On Network (the video ads on AOL-owned or operated websites),

Be On (branded content production), Convertro (ad data analytics) and Gravity, which offers the means to deliver personalized ads to individual online users.

Verizon is after these AOL ad tech assets. Despite its 100 million paying subscribers, Verizon is a US-only operation. Its pay-TV platform Verizon FiOS, with nearly 7 million Internet subscribers and only 5.7 million video-on-demand customers (DirecTV has 37 million-plus customers), has not made much traction as a brand.

In 2014, it paid US\$200m for OnCue, what was left after an ill-fated attempt by computer chips manufacturer Intel to enter the streaming TV business. And there are rumors it is planning a mobile video streaming service this year.

Verizon is hoping that AOL's ad tech properties will expand its reach for advertising revenue at a time when growth in subscriptions for the maturing telecom services is slowing.

With Armstrong staying on at AOL, the melding of the two companies' corporate cultures should go relatively smoothly. But telecoms and communications technology requires constant investment to keep up with demand. On the other hand, content creation is a sector centered on skills that are notoriously deemed indispensable. Clashes might ensue.

Furthermore, industry observers are concerned that Verizon might use the acquisition to give AOL's content preferential treatment by offering faster bandwidth at the expense of third-party content owners.

The Verizon-AOL merger could be signaling consolidation in the telecoms sector but not in the way the industry could have foreseen. ###

PROMOTION

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D

isruption Directory

Thumbnail outline of the latest in groundbreaking technologies

ADVERTISING/MARKETING

Product: **iAd**, Apple's programmatic mobile ad platform

Need to know because Apple is adding Apple Music's radio stations (formerly iTunes Radio) to the iAd network, enabling advertisers to include the stations among the mobile advertising inventory Apple offers marketers. Until now, advertisers seeking to buy real estate on iTunes Radio had to go through its sales staff. Now the advertisers and their developers can use iAd's automation Workbench software to place ads directly into apps that appear on Apple devices, including the iPhone and iPad.

Creative function: mobile advertising; digital advertising; programmatic ads

Creative target: advertisers, marketers, brand owners; ad agencies; app developers

Company: Apple, based in Cupertino, California, US

Key executive(s): iAd Vice President Todd Teresi, Beats Music CEO/Head of iTunes Radio Ian Rogers

Investors/Owners: Apple

Distribution platform: Online radio; mobile Internet

Launched: 2010

URL: <http://advertising.apple.com/uk>

###

Product: **LinkedIn Ads**, the ad network operated by the social media network for professionals

Need to know because LinkedIn hopes to boost ad revenues by making it possible for advertisers to post campaigns not only on its platform but also on related websites across the Internet for the first time. It will also enable LinkedIn to analyze online data based on the behavior of its targeted users both inside and outside of the LinkedIn platform

Creative function: social ads; digital advertising

Creative target: business-to-business marketers; advertisers; brand owners

Company: LinkedIn Corporation, based in Mountain View, California, US

Key executive(s): Marketing Solutions Head of Product Russell Glass,

Investors/Owners: LinkedIn Corporation

Distribution platform: Internet; network of online publishers

Launched: 2012; **URL:** www.linkedin.com/ads ###

Product: **Samba Ads**, developer of online video ads

Need to know because a group of international investors have agreed to support this online video ads server with BRL3m (US\$1m) in new funding. Samba Ads is the subsidiary of Samba Tech, Brazil's largest business-to-business online streaming service provider, and the investors are led by Israeli companies Rhodium and Initial Capital, plus Brazil's e-Bricks Digital and California-based 500 Startups

Creative function: online advertising; video advertising; digital ads

Creative target: advertisers; brand owners; marketers; ad agencies

Company: Samba Ads, based in Sao Paulo, Brazil

Key executive(s): CEO Rodrigo Paolucci; co-founder Gustavo Caetano

Investors/Owners: Initial Capital; Rhodium; e-Bricks Digital; 500 Startups

Distribution platform: Internet; mobile apps

Launched: 2012

URL: www.sambaads.com.br

###

ARCHITECTURE/DESIGN

Product: **WinSun Global**, joint venture to develop 3D printing tech for construction industry

Need to know because the joint venture was formed by China's WinSun Decoration Design Engineering Co, the engineering conglomerate, and its subsidiary Yingchuang New Materials, plus an unidentified US company, to expand the technology into other countries. Yingchuang New Materials is taking construction 3D printing to a mass production level. In January, in just a few days, it used a gigantic 3D printer to complete the world's first villa and the tallest building, 'printed' in 3D in the city of Suzhou, Jiangsu Province. The machine spewed out panels made from construction waste and recycled stone, which were then assembled into buildings. Future potential uses of the 3D construction printer include the building of bridges.

Creative function: 3D printing; building construction; building design

Creative target: Property developers

Company: Yingchuang New Materials Inc, based in Shanghai, China

Key executive(s): Inventor/CEO Ma Yihe

Investors/Owners: WinSun Decoration Design Engineering Co; unidentified U.S. company

Distribution platform: 3D printing

Launched: 2002

URL: <http://www.vhbm.com/>

###

DISRUPTION DIRECTORY

BOOKS/PRINT MEDIA

Product: **Gigaom**, new-tech online blogs and news publisher
Need to know because after raising more than US\$22m from investors and supporters, tech and start-ups blog publishing giant Gigaom has folded. After eight years of championing the fast-growing digital tech scene in Silicon Valley and its counterparts worldwide, the website ceased operations on 9 March 2015. Reasons given include: “Gigaom recently became unable to pay its creditors in full and on time.”

Creative function: blogs publishing

Creative target: digital tech company executives; journalists

Company: Giga Omni Media Inc, based in San Francisco, California, US

Key executive(s): Founder Om Malik; CEO Michael Rolnick

Investors/Owners: Reed Elsevier Ventures; Alloy Ventures; True Ventures; Shea Ventures

Distribution platform: Internet; blogs

Launched: 2006

URL: www.gigaom.com

###

Product: **Kindle Unlimited**, Amazon.com’s e-books subscription service
Need to know because it has been officially declared illegal in France. La Médiatrice du Livre (the books’ industry czar) Laurence Engel has declared that Kindle Unlimited and its local rivals are breaking the law by offering the unlimited subscription model to French books produced by French publishers. This is because, in France, only the retailers are allowed to set the prices for locally published books. That law does not apply to self-published e-book titles or foreign ones. The ruling could trigger debates about whether monthly subscriptions have the same impact as buy-to-own business models for the sector.

Creative function: e-books retail; e-books publishing

Creative target: book publishers; book retailers; authors; readers; regulators

Company: Amazon.com Inc, based in Seattle, Washington, US

Key executive(s): Amazon.com founder/CEO Jeff Bezos

Investors/Owners: Amazon.com Inc

Distribution platform: Internet; Kindle

Launched: 2014

URL: www.amazon.com

###

Product: **OverDrive**, e-book and audio books marketplace and distributor
Need to know because Rakuten, Japan’s largest e-commerce conglomerate, has agreed to pay US\$410m for OverDrive as part of its ambitions to own one of the world’s biggest content portfolios. OverDrive, which uses its “sharing economy” vision to make as many books as possible available online, offers access to 2.5 million-plus titles supported by relationships with 5,000 publishers and 30,000 libraries in more than 40 countries.

Creative function: e-book publishing; e-book and audio book distribution

Creative target: book publishers; book retailers; libraries; schools; readers

Company: OverDrive Inc, based in Cleveland, Ohio, US

Key executive(s): OverDrive founder/CEO Steve Potash; Rakuten’s Head of Global E-book Business Takahito Aiki

Investors/Owners: Rakuten

Distribution platform: Connected devices with iOS mobile apps, Android apps, Chromebook, Mac OS, Windows and Windows Phone

Launched: 1986

URL: www.overdrive.com

###

Product: **Penguin Random House (PRH)**, world’s largest book publisher
Need to know because the publishing giant has made the radical move to build a new website aimed at helping readers discover titles. The strategy is worth noting because book publishers have traditionally used websites to promote their imprints, which in PRH’s case includes Knopf, Doubleday, Vintage, Penguin Books and Pelican Books. But following the merger of Bertelsmann’s Random House and Pearson PLC’s Penguin Group in 2013, the resulting PRH is focusing on promoting all books directly to consumers under one brand name. For purchases, it offers links to retailers’ sites.

Creative function: book publishing; books retail; books marketing

Creative target: retailers; readers; authors

Company: Penguin Random House (PRH), based in New York City, US

Key executive(s): PRH CEO Markus Dohle; PRH UK CEO Tom Weldon

Investors/Owners: Bertelsmann; Pearson

Distribution platform: Print media; e-books

Launched: 2013

URL: www.penguinrandomhouse.com

###

DISRUPTION DIRECTORY

Product: Teon Media, digital platform for automotive manuals

Need to know because it has been acquired by Haynes Publishing Group, the UK company specializing in practical “how-to” books and manuals aimed at mechanics, car and aviation enthusiasts, for £450,000 (US\$707,517).

Creative function: book publishing; instruction manuals

Creative target: book publishers; auto industry; auto enthusiasts

Company: Teon Media Ltd, based in Darlington, County Durham, UK

Key executive(s): Haynes Publishing CEO Eric Oakley; Teon Media founder Peter George

Investors/Owners: Haynes Publishing Group

Distribution platform: Mobile apps; print media; video

Launched: 2011

URL: <https://teon.co> ###

Product: Yuewen Group, China’s biggest e-book publishing and retail conglomerate

Need to know because it acquired that status in March after Chinese tech giant Tencent Holdings merged its books retail subsidiary Tencent Literature with rival Shanda Cloudary. The newly created company will own a portfolio of more than 3 million book titles, reach 100 million readers and generate annual revenues of about CNY200m (US\$32m). For marketing, Yuewen Group will take advantage of Tencent’s extensive mobile media properties, including messaging apps WeChat and Mobile QQ, which reach more than 8 million users. It plans to invest CNY100m (US\$16m) in book rights, develop a books search engine and create a new e-book reader.

Creative function: book publishing; book retail

Creative target: book publishers; book retailers; authors; readers

Company: Yuewen Group, based in Shanghai, China

Key executive(s): CEO Wu Wenhui

Investors/Owners: Tencent Holdings; Shanda Interactive Entertainment

Distribution platform: Internet; e-books; smartphones; connected devices

Launched: 2015

URL: <http://book.qq.com> (for Tencent Literature)

###

FASHION

Product: Apple Watch, the smartwatch from the iPhone maker

Need to know because its launch in April marked the pioneering tech company’s first foray into the personal luxury goods market and the long-awaited first major new item to be issued since Tim Cook became Apple’s CEO in 2011. The watch, which is being marketed as a fashion product as opposed to a tech one, includes a gold edition that costs a hefty US\$10,000-plus.

Creative function: fashion design; connected device

Creative target: fashion retailers; tech retailers

Company: Apple, based in Cupertino, California, US

Key executive(s): CEO Tim Cook

Investors/Owners: Apple Inc

Distribution platform: Smartwatch

Launched: 2015

URL: www.apple.com

###

Product: Beyond Surface Technologies (BST), developer of environment-friendly fabric and textile surfaces

Need to know because the company, which specializes in using natural raw materials (as opposed to harmful chemicals) to treat waterproof clothing, has snapped up new investment from US-based outdoor apparel designer and manufacturer Patagonia. The investment was made via Patagonia’s \$10 Million & Change fund, which aims to support producers of eco-friendly and responsible products and services.

Creative function: responsible clothing treatment; clothing design

Creative target: responsible fashion designers

Company: Beyond Surface Technologies, based in Pratteln, Switzerland

Key executive(s): BST CEO Matthias Foessel

Investors/Owners: including Patagonia; private investors

Distribution platform: Textile

Launched: 2008

URL: www.beyondst.com

###

Product: Face by Holition, virtual face cosmetics app

Need to know because it functions as a virtual beauty counter in the palm of the hand, enabling shoppers to try out a brand’s lipstick, foundation, eye shadow, without smudging, smothering or staining their hands, clothes or face first. Using face-tracking technology, the app turns a smartphone or tablet into a mirror showing what the face looks like as the shoppers switch from one make-up color or shade to the next with each click. Once they are happy with a color, they can click to buy. The “virtual reality” format also allows users to save a particular look on the mobile to share with friends.

Creative function: cosmetics marketing

Creative target: cosmetic brand owners; beauty retailers

Company: Holition Augmented Retail, based in London, UK

Key executive(s): Holition CEO Jonathan Chippindale; Head of Production Kiran Birk

Investors/Owners: n/a

Distribution platform: Internet; mobile app

Launched: 2015

URL: www.holition.com/face ###

DISRUPTION DIRECTORY

Product: **Moda Operandi**, online luxury store

Need to know because the company, which promises to give customers access to the latest fashion collections immediately off the runway shows and before they hit the stores, has amassed US\$60m in an E Series round of financing. The funds will be used to expand its reach in key regions (Europe, the Middle East and Asia), develop its mobile retail strategy and marketing. The investment was led, among others, by Fidelity Investments, Advanced Publications (owner of Vogue magazine publisher Condé Nast) and New Enterprise Associates.

Creative function: fashion retail

Creative target: fashion brands; luxury brands

Company: Moda Operandi, based in New York, US

Key executive(s): CEO Deborah Nicodemus; co-founder Lauren Santo Domingo

Investors/Owners: Fidelity Investments; New Enterprise Associates; Advanced Publications; LVMH; New Atlantic Ventures; RRE Ventures

Distribution platform: Internet

Launched: 2011

URL: www.modaoperandi.com

###

Product: **Poshmark**, women's online fashion marketplace

Need to know because it has raised US\$25m in a Series C round of funding, bringing its total financing to US\$47.2m to date. The investors are Mayfield, Menlo Ventures, Shea Ventures, SoftTech VC, Inventus Capital Partners and Union Grove Venture Partners. The money will be used to grow the business and reach a larger group of customers.

Creative function: fashion retail; shoppers

Creative target: fashion brands

Company: Poshmark, based in Menlo Park, California, US

Key executive(s): Founder/CEO Manish Chandra

Investors/Owners: Mayfield; Menlo Ventures; Shea Ventures; SoftTech VC; Inventus Capital Partners; Union Grove Venture Partners

Distribution platform: Internet; mobile apps; Apple Watch

Launched: 2011

URL: <http://poshmark.com>

###

FILM/VIDEO

Product: **Dextro's Stream**, an app within an app that

makes Periscope's live video streams discoverable in real time
Need to know because Dextro's Stream aims to help users of the very popular new live streaming video apps Twitter's Periscope and rival Meerkat, scan, categorize and tag each streamed video by topic, enabling them to search and discover what other people are streaming in real time. Twitter's Periscope and its rival app Meerkat (**see News Analysis**) are the latest technology tools disrupting media and entertainment. Smartphone users' ability to use them to film and stream live events and share via social media is causing live entertainment and sports right owners concern.

Creative function: social media; video streaming; mobile app

Creative target: live video rights owners; social media platforms

Company: Dextro, based in New York, US

Key executive(s): Founder David Luan; founder Sanchit Arora

Investors/Owners: include Esther Dyson; Michael Provenzano; RRE Ventures; kbs+ Ventures; Connecticut Innovations; YEI Innovation Fund

Distribution platform: Mobile app

Launched: 2013

URL: <http://stream.dextro.co>

###

Product: **Ferris**, mobile video editing and sharing app

Need to know because its developer has raised US\$2m in funds to build the app that enables consumers to shoot, categorize, discover and share the myriad video clips being shot daily with their smartphones. The funding round was led by Upfront Ventures.

Creative function: video clip production and editing

Creative target: consumers; video artists

Company: Ferris, based in Santa Monica, California, US

Key executive(s): Co-founder/CEO Paul Boukadakis; co-founder/CTO Chris Shaheen

Investors/Owners: include Upfront Ventures; Allen DeBevoise; Daher Capital

Distribution platform: Internet; iOS and Android mobile app

Launched: 2012

URL: www.ferris.tv

###

DISRUPTION DIRECTORY

Product: **Kolor**, virtual reality software developer

Need to know because it was acquired by GoPro, the NASDAQ-quoted manufacturer of extreme and action sports cameras, in April. GoPro was drawn to Kolor's capabilities, which include the technology that enables users to take high-resolution panoramic and spherical photographs or video live action scenes to view on mobile, online and, more interestingly, via virtual reality headsets, such as the Oculus Rift, to get that 360-degree immersive experience.

Creative function: video production; photography; virtual reality

Creative target: action sports video producers, photographers and enthusiasts

Company: Kolor, based in Savoie, France

Key executive(s): CEO Alexandre Jenny; co-founder Lionel Laissus; GoPro founder/CEO Nicholas Woodman

Investors/Owners: GoPro Inc

Distribution platform: Camcorders; virtual reality headmounts; head-mounted HD camera; 360-degree camera lens

Launched: 2004

URL: www.kolor.com

###

Product: **Victorious**, bespoke developer of apps for online video stars and their super fans

Need to know because these apps, designed to be personalized hubs for YouTube entertainers and other online superstars to interact with their most devoted followers, have finally gone live. According to media reports, the apps' infrastructure has been in development for almost two years.

The start-up wanted to take time to ensure each app suited the users' different needs, such as offering exclusive content, launching new videos, chatting live with fans, and monetizing them via ads and e-commerce.

Creative function: digital marketing

Creative target: YouTubers; brand influencers; online celebrities

Company: Victorious, based in Santa Monica, California, US

Key executive(s): Co-founder/CEO Sam Rogoway; co-founder/Chief Creative Officer Bing Chen

Investors/Owners: include United Talent Agency; William Morris Endeavor; Mucker Capital; Advancit Capital; A-Grade Investments; Bertelsmann Digital Media Investments; Canaan Partners

Distribution platform: Internet; iOS and Android mobile platforms

Launched: 2013

URL: www.victorious.com

###

GAMES

Product: **CodeFights**, social game based on computer coding skills

Need to know because the tech start-up that created the game has raised US\$2.4m in seed funding. The money will be used to grow the game, which is aimed at developers pitting against each other or a time clock to see how long the winner takes to complete a computer programming or coding task in real time. The challenges devised are for different levels of skills.

Creative function: games development

Creative target: games developers; coders; hackers; mathematicians

Company: CodeFights, based in San Francisco, California, US

Key executive(s): Co-founder/CEO Tigran Sloyan; co-founder/CTO Aram Shatakhtsyan; co-founder Felix Desroches

Investors/Owners: Maiden Lane Ventures; Sutter Hill Ventures; Felicis Ventures; Granatus Ventures, Mesa Ventures plus individual investors | like Adam D'Angelo and Bismarck Lepe

Distribution platform: Internet

Launched: 2014

URL: <http://codefights.com>

###

Product: **gamesGRABR**, video games social network

Need to know because its developer, British businessman Tony Pearce, has used the Crowdcube crowdfunding website to raise £454,734 (US\$ 295.320) to develop GamesGRABR. It is the brand name for his new "Pinterest-style" games social media network aimed at gamers. It enables them to upload their digital games and other related content they have curated onto the website to share with friends and other gamers.

Creative function: social media; games distribution

Creative target: gamers; games developers

Company: TeePee Games, based in London, UK

Key executive(s): CEO/founder Tony Pearce; CTO David Glennie

Investors/Owners: Crowdcube online investors

Distribution platform: mobile and desktop Internet

Launched: 2010

URL: www.gamesgrabr.com

###

Product: **Lego Dimensions**, a new toys-to-life game

Need to know because Warner Bros Interactive, which currently owns the console-games and iOS rights to the Lego bricks brand, is launching the first ever toys-to-life version called Lego Dimensions this September. The toys-to-life games category is currently dominated by Activision's Skylanders and The Walt Disney Company's Disney Infinity. Not only will Lego Dimensions be playable on standard games consoles, but it

DISRUPTION DIRECTORY

also comes with a Toy Pad sensor. When characters from movie franchises such as The Wizard of Oz, the Batman series, or The Lego Movie are built from Lego bricks and placed on the Toy Pad, they are brought to life as cartoon versions inside the game. This gives players the choice of which characters they want see featured in the game.

Creative function: games development; games interactivity

Creative target: games developers; movie marketers

Company: The LEGO Group, based in Billund, Denmark

Key executive(s): Warner Bros Entertainment Senior Vice President for the Lego Franchise and TT Games Jeff Junge

Investors/Owners: The Lego LEGO Group; Warner Bros Entertainment; TT Games

Distribution platform: Consoles including Xbox 360; Xbox One; PlayStation 3; PlayStation 4; Wii U

Launched: 2015

URL: www.lego.com

###

Product: **TabTale**, international mobile games apps publisher

Need to know because the Israeli developer of children's games apps has snapped up Las Vegas-based casual games creator Sunstorm Games for a reported US\$6m. The move is the first US acquisition by TabTale, which had so far focused on buying Israeli rivals. It also boosts the global market share for TabTale, which boasts more than 600 million downloads of its games worldwide.

Creative function: games development

Creative target: games developers; digital publishers

Company: TabTale, based in Tel Aviv, Israel

Key executive(s): TabTale CEO Tagi Schliesser, CTO Nir Bejerano

Investors/Owners: Qualcomm Ventures; Vintage Investment Partners; Magma Venture Partners

Distribution platform: Internet; iOS and Android mobile apps

Launched: 2010

URL: www.tabtale.com

###

MUSIC

Product: **Fuga**, one stop shop digital music technology service provider

Need to know because its shareholders, including international rights management company Fintage House, have topped their investments to expand Fuga's content management, rights analytics and trends-prediction systems internationally.

Creative function: rights management; rights data analytics

Creative target: record labels; music distributors; artists management

Company: Independent ID, based in Amsterdam, the Netherlands

Key executive(s): CEO Pieter van Rijn; Board Adviser Martijn Tjho; Artist & Labels Promotion Manager Sarah Hilderling van Lith

Investors/Owners: Fintage House; Leon Ramakers

Distribution platform: Internet

Launched: 2006

URL: www.fuga.com

###

Product: **Grooveshark**, controversial music streaming platform

Need to know because it shut down on 30 April after almost 10 years of fighting accusations of commercially benefiting from the use of music without rights owners' permission. And it has admitted as much. "We started out nearly ten years ago with the goal of helping fans share and discover music. But despite the best of intentions, we made serious mistakes. We failed to secure licenses from rights holder from the vast amount of music on the service. That was wrong. We apologise. Without Reservation. As part of a settlement agreement with the major record companies, we have agreed to cease operations immediately, wipe clean all the record companies' copyrighted works and hand over ownership of this website, our mobile apps and intellectual property including our patents and copyright."

Creative function: music distribution

Creative target: record labels; music publishers

Company: Grooveshark, based in Gainesville, Florida, US

Key executive(s): Founders Sam Tarantino, Josh Greenberg and Andrés Barreto

Investors/Owners: Escape Media Group

Distribution platform: Internet

Launched: 2006

URL: www.grooveshark.com

###

Product: **MixRadio**, mobile-delivered music streaming platform

Need to know because the Microsoft subsidiary has been snapped up by LINE, the Japanese tech giant that owns the popular messaging app of the same name. The deal is significant as streaming music has not really taken off in Japan and Sony Corporation killed off its Music Unlimited service early this year after launching four years ago. But LINE has recently extended MixRadio's reach from being a (Microsoft) Windows Phone only app to the iOS and Android platforms as well. Besides, MixRadio might not need Japan, LINE's native market. The music service is already in 31 countries, while the LINE messaging app is in 230 territories. This acquisition will give LINE subscribers access to an international streaming music service.

DISRUPTION DIRECTORY

Creative function: music distribution; music marketing
Creative target: record labels; music publishers; social music fans
Company: MixRadio, based in Bristol, UK
Key executive(s): CEO Jyrki Rosenberg
Investors/Owners: LINE Corporation
Distribution platform: Windows Phone app; recently expanded to Android and iOS apps
Launched: 2007 by Nokia; 2014 by Microsoft
URL: www.mixradiomusic.com
 ###

Product: Music Messenger, a mobile-to-mobile music messaging service
Need to know because UK-based Russian oligarch Roman Abramovich and Nicki Minaj's manager Gee Roberson recently contributed to a \$30 million investment in Music Messenger, an emerging start-up. The free app enables smartphone users to share video and audio playlists to listen to straightaway. The users do not need to click on a link that takes them out of the Music Messenger environment before they can start listening to the song. It is currently available in 10 different languages and the ease of use has won it a large following among artists and music marketers. It is reported to already have a value of US\$100m.
Creative function: recorded music; music marketing
Creative target: artists; labels; music publishers
Company: Music Messenger, based in Kibbutz Glil Yam, Israel
Key executive(s): Co-founders OD Kobo, David Strauss, Shai Azran, Uzi Refaeli
Investors/Owners: music artists David Guetta, Will.i.am, Avicii, Tiesto; songwriter/entrepreneur Benny Andersson; artist managers Ash Pournouri, Gee Roberson; Russian oligarch Roman Abramovich
Distribution platform: iOS and Android mobile apps
Launched: 2014
URL: <http://musicmessenger.co>
 ###

Product: Next Big Sound, music data analytics company
Need to know because the New York Stock Exchange-quoted Pandora, the US' biggest streaming music service with its own popular online radio channels, has agreed to buy Next Big Sound for an undisclosed sum. The move gives Pandora access to one of the world's biggest centralized music data analytics platforms. It hosts myriad information about artists and recordings on traditional, digital and social media. It is used by label executives, artists, their agents, managers, music publishers, and talent spotters for business and artist-related strategies. The acquisition should

cement Pandora's relationship with the music industry and enhance its advertising offering. And data from Pandora's 80 million active monthly users will also strengthen Next Big Sound's data resources.

Creative function: music data analytics; music distribution; music marketing
Creative target: record labels; music publishers; talent agents; artists
Company: Next Big Sound
Key executive(s): Next Big Sound CEO Alex White; Pandora CEO Brian McAndrews
Investors/Owners: Pandora Media Inc
Distribution platform: Analytics database; Internet
Launched: 2009
URL: <https://www.nextbigsound.com/pandora>
 ###

Product: The Orchard, digital music distribution platform and YouTube multichannel network
Need to know because it has bought RoyaltyShare, a leading US music royalties analytics, processing and reporting software developer, and made a strategic investment in UK-based Korrek Music Royalty Software, another royalties processing firm. The Orchard's ambition is not only to distribute and market its clients' music, but also to provide solutions for them to track digital usage of their music for the royalties due.
Creative function: royalties tracking, processing and distribution
Creative target: record labels; artists; music publishers; rights owners
Company: The Orchard, based in New York, US
Key executive(s): The Orchard CEO Brad Navin; Sony Music Entertainment President of Global Digital Business Dennis Kooker; RoyaltyShare CEO Steve Grady; Korrek Managing Director Simon Peters
Investors/Owners: Sony Music Entertainment
Distribution platform: The Internet; YouTube
Launched: 1997
URL: www.theorchard.com
 ###

Product: Smule, social music app developer
Need to know because the start-up has raised US\$38m in a combination of equity and debt funding for international expansion, product growth and marketing. Smule's unique selling point has been to develop apps that encourage and enable users to perform, learn to play, create and share recorded music. Its estimated 25 million users, including 350,000 paying subscribers, upload 4 billion performances of songs annually. And registered users can pay to access the songs.
Creative function: recorded music
Creative target: amateur musicians and performers; talent scouts
Company: Smule, based in San Francisco, California, US

DISRUPTION DIRECTORY

Key executive(s): CEO/co-founder Jeffrey Smith; Chief Product and Design Officer Jeannie Yang

Investors/Owners: Adam Street Partners; Bessemer Ventures; Shasta Ventures; City National Bank

Distribution platform: Android and iOS mobile apps

Launched: 2008

URL: www.smule.com

###

Product: **Starmaker Interactive**, social music app and YouTube multichannel network

Need to know because the US start-up behind the talent discovery app has raised US\$6.5m in a new financing round led by Raine Ventures. The technology functions as a boot camp trainer for discovering and developing aspiring singing stars, encouraging them to practice and perform their favorite recordings. The recording can then be judged by the singer's peers within the "Starmaker community" and might even get noticed by a real talent spotter. The money raised will be used for the app's international rollout.

Creative function: recorded music

Creative target: aspiring artists; music fans; label A&R executives

Company: Starmaker Interactive, based in San Francisco, California, US

Key executive(s): CEO/co-founder Jeff Daniel

Investors/Owners: Raine Ventures; Crosscut Ventures; GREE International; iGlobe Partners; Qualcomm Ventures; Three Bridges Ventures; Allen DeBevoise; Joe [Perez](#)

Distribution platform: iOS and Android mobile apps

Launched: 2010

URL: www.starmakerstudios.com

###

PHOTOGRAPHY/ART

Product: **Auctionata**, live streaming auction website

Need to know because it raised €12m (US\$46.12) in a new round of funding in March. Investors are excited about the company's ability to offer reliable regular online auctions at a time when corporate auction houses like Sotheby's and Christie's have failed to make a significant impact in the online sector. Auctionata currently focuses on hosting sales of fine art, contemporary and antique works, plus luxury items such as classic cars, jewelry and vintage wine. The new cash will be used to raise Auctionata's game by adding new categories like rare musical instruments, diamonds and memorabilia.

Creative function: e-commerce

Creative target: art collectors

Company: Auctionata, based in Berlin, Germany and New York

Key executive(s): CEO/founder Alexander Zacke

Investors/Owners: MCI Management; Hearst Ventures; Kreos Capital; Yuan Capital; Earlybird; e.ventures; Kite Ventures; Raffay Group; TA Ventures; Bright Capital; REN Invest; Holtzbrinck Ventures; Groupe Arnault

Distribution platform: Internet

Launched: 2013

URL: <http://auctionata.com>

###

Product: **Lifecake**, family-friendly photo sharing app

Need to know because the "mobile-first" service designed to make it easy for parents to capture, store, manage and edit photographs of family members, especially the kids, is now a subsidiary of Canon Europe. Lifecake boasts 350,000 registered users, mostly parents using it to build a timeline of their children growing up to share with relatives and friends, mainly those living abroad. Canon, one of the world's largest manufacturers of traditional and digital SLR (single-lens reflex) cameras, hopes owning Lifecake will offer the tools to become a service provider as well. In addition to its apparent ease of use, the Lifecake app will help a company like Canon compete more effectively against the fast-growing new generation of smartphone cameras.

Creative function: photography

Creative target: photography enthusiasts

Company: Lifecake, based in London, UK

Key executive(s): Lifecake CEO/co-founder Nicholas Babaian; Canon Europe Director of Digital Services Alberto Spinelli

Investors/Owners: Canon Europe

Distribution platform: iOS and Android apps

Launched: 2012

URL: www.lifecake.com

###

Product: **Pinterest**, photo sharing website and app

Need to know because it has seen its valuation more than double to US\$11bn in the last 12 months alone following its move in January to start selling advertising (Promoted Pins). This prompted investors to pour in US\$367m in new cash in March, plus an additional US\$186m in a Series G round of funding in May, bringing total investments to US\$1.3bn. Recently it also added Cinematic Pins to its advertising inventory. Described as video ads, they are more like looping short videos. Pinterest has avoided videos, which are thought to be too distracting for the passive and serene creativity that has boosted Pinterest's popularity among those who also use the pinned images to curate ideas or work on projects.

Creative function: photography; design

Creative target: photographers; designers; project managers

Company: Pinterest, based in San Francisco, California, US

DISRUPTION DIRECTORY

Key executive(s): CEO/co-founder Ben Silbermann; co-founders Paul Sciarra and Evan Sharp

Investors/Owners: include Goldman Sachs; Wellington Management Company; Andreessen Horowitz; Bessemer Venture Partners; FirstMark Capital; SV Angel; Valiant Capital Management; Fidelity Investments

Distribution platform: Internet, iOS and Android mobile apps

Launched: 2009

URL: www.pinterest.com

###

SOCIAL MEDIA

Product: **Anthology**, Facebook's video ads and branded content platform

Need to know because this appears to be Facebook's attempt to enter the branded content space. The Anthology initiative sees the Facebook Creative Shop division pair advertisers and their ad agencies with an established online video content producer, such as VICE Media, Electus Digital, Vox Media and The Onion. These online media and entertainment creators will then produce an online commercial or branded entertainment for distribution on Facebook.

The production will be based on findings from Facebook's analytics system to gain insights that will help produce the most appropriate ad for the client. The findings are shared with the brand owner.

Creative function: digital advertising; social marketing

Creative target: advertisers; chief marketing officers; ad agencies

Company: Facebook, based in Menlo Park, California, US

Key executive/s: CEO Mark Zuckerberg

Investors/Owners: Facebook

Distribution platform: Facebook's News Feed

Launched: 2015

URL: www.facebook.com/business/news/anthology

###

Product: **Instant Articles**, the new mobile app that has turned Facebook into an online publisher

Need to know because it is an experimental project by Facebook, the world's largest social media platform with more than 1.3 billion registered users, to become a publishing hub in its own right. Currently, if publishers want to reach Facebook readers, they install a link on the network, which takes them back to the publishers' websites. The Instant Articles app, which is being developed with BuzzFeed, The New York Times, and NBC News, among other online publishers, allows users to read their articles

directly on Facebook's mobile app *with no delays*. Ideal for Facebook, which wants to maintain the soaring growth of its mobile ads.

Creative function: digital publishing; digital advertising

Creative target: online publishers; advertisers; ad agencies

Company: Facebook, based in Menlo Park, California, US

Key executive/s: CEO Mark Zuckerberg

Investors/Owners: Facebook

Distribution platform: iOS mobile app

Launched: 2015

URL: www.facebook.com/instantArticles

###

Product: **lynda.com**, online education platform

Need to know because the digital platform used by professional creative specialists, including professionals who specialize in teaching Photoshop and other design software, has been grabbed by professional social network LinkedIn for a reported US\$1.5bn in cash (52%) and stocks. Users of the multi-lingual lynda.com courses gain opportunities to develop skills needed for potential and existing jobs. Lynda.com was previously owned by investment firms including Accel Partners, TPG Capital, Meritech Capital Partners and Spectrum Equity.

Creative function: creative design; photography

Creative target: creative industry professionals

Company: lynda.com, based in Carpinteria, California, US

Key executive/s: LinkedIn Vice President of Global Content Products Ryan Roslansky; lynda.com Co-founder/Executive Chair Lynda Weinman

Investors/Owners: LinkedIn Corporation

Distribution platform: Internet; mobile apps

Launched: 1995

URL: www.lynda.com

###

Product: **Niche**, social media talent agency

Need to know because it was acquired by micro-blogging giant Twitter earlier this year to connect social media celebrities with brand owners. It is aimed at marketers who want to leverage and monetize their millions of followers on mobile social-media platforms like short-form video sharing app Vine and Instagram, Facebook's photo-sharing app, among others.

Creative function: branded content; social marketing

Creative target: celebrities; artists; brand owners; advertisers

Company: Niche, based in New York, US

Key executive/s: Niche co-founders Rob Fishman and Darren Lachtman; Director of Partnerships Leah Feygin

Investors/Owners: Twitter

DISRUPTION DIRECTORY

Distribution platform: mobile social media

Launched: 2013

URL: www.niche.co

###

Product: Snapchat, ephemeral photo messaging app

Need to know because it is thought to be worth US\$15bn following the US\$200m investment from Alibaba Group Holding, the Chinese e-commerce giant, in March. This share acquisition has valued Snapchat at US\$12bn more than the US\$3bn takeover offered by Facebook in 2013, when Snapchat was only two years old. With its reported 100 million users, Snapchat is broadening its portfolio of content, including professionally made videos from media owners like CNN, Viacom's Comedy Central, National Geographic and Disney's ESPN. But media reports indicate this publishing service, called Discover, has not been a hit with Snapchat users.

Creative function: photography; messaging; publishing

Creative target: digital natives; content owners

Company: Snapchat, based in Los Angeles, California, US

Key executive/s: Co-founder/CEO Evan Spiegel

Investors/Owners: including Alibaba Group Holding; August Capital; Yahoo Inc; GIC; Kleiner Perkins Caufield & Byers

Distribution platform: Android and iOS apps

Launched: 2011

URL: www.snapchat.com

###

SPORTS

Product: Hawk-Eye, sports video processing technology

Need to know because after establishing its credentials as the must-use technology for arbitrating disputed points at the UK's tennis championships at Wimbledon and cricket tournaments, Hawk-Eye is gaining traction among other major sport events. It is being used as the "official goal-line technology" for the first time at a FIFA's Women's World Cup competition, which is being held 6 June to 5 July in Canada. It is also being tested for use at this year's Rugby World Cup in the UK this September. The technology's system is able to use high-speed cameras to track a ball's trajectory (during tennis, cricket, soccer, among other sports). It recreates the ball's path in a 3D image, which can be replayed on video and TV to determine whether a soccer has crossed the goal line, or a tennis ball was inside or outside the service line. It has proven effective when decisions by match officials are challenged by the participating athletes and players. But sport regulators have been wary of its rollout.

Creative function: sports broadcasting

Creative target: TV broadcasters; sports organizations

Company: Hawk-Eye Innovations, based in Basingstoke, UK

Key executive/s: Managing Director Stephen Carter

Investors/Owners: private

Distribution platform: computer simulators

Launched: 1999

URL: www.hawkeyeinnovations.co.uk

###

Product: Under Armour Inc, sports clothing and accessories firm

Need to know because the US sports apparel and accessories giant has invested in tech by pouring US\$560m into two fast growing fitness app start-ups. It paid US\$475m for US-based MyFitnessPal, which keeps track of users' eating habits and their nutrition, and US\$85m for Endomondo, a fitness motivation app from Denmark. Under Armour has boosted its share of the US sports gear market by incorporating wearable tech into its products.

Creative function: connected fitness; wearable technology; sports; health

Creative target: fitness activists; athletes; trainers

Company: Under Armour Inc, based in Baltimore, Maryland, US

Key executive/s: CEO/Chairman Kevin A Plank; President of Footwear and Innovation Kip J Fulks

Investors/Owners: New York Stock Exchange-listed

Distribution platform: mobile app

Launched: 1996

URL: www.underarmour.com

###

TELEVISION

Product: BBC Store,

Need to know because the new direct-to-consumer digital retail service from BBC Worldwide, the UK public broadcaster's commercial subsidiary, is set for a fall launch. The move is significant as it will for the first time allow the license-fee playing viewers to purchase and download TV shows they want to own.

Creative function: retail

Creative target: TV producers, distributors and rights owners

Company: BBC Worldwide, based in London, UK

Key executive(s): CEO Tim Davie

Investors/Owners: BBC

Distribution platform: Internet; mobile apps

Launched: 2015

URL: www.bbcworldwide.com

###

DISRUPTION DIRECTORY

Product: **Bright House Networks**, US cable TV operator

Need to know because it is the country's sixth largest cable TV operator and it is in talks to be acquired for US\$10.4bn by a joint venture of Charter Communications, the country's fourth largest, and Advance/Newhouse Partnership, Bright House's parent company. Charter will own 73.7% of the proposed partnership. Bright House has 2.2 million customers, mostly in Florida, California and a handful of other US states. The transaction is taking place as Charter bids for Time Warner Cable, the US' second largest cable operator, in a deal that will be worth a reported US\$78.7bn when completed. Should all agreements go through, Bright House is set to be part of the second biggest cable operator in the US.

Creative function: video content distribution; telecommunications

Creative target: video and TV content producers

Company: Bright House Networks, based in Syracuse, New York, US

Key executive(s): Bright House CEO Steven Miron; Charter Communications CEO Tom Rutledge;

Investors/Owners: Advance/Newhouse Partnership

Distribution platform: cable network

Launched: 2003

URL: www.brighthouse.com

###

Product: **iflix**, streaming video-on-demand platform

Need to know because it has snapped up US\$30m in new investment to fulfil ambitions to become Asia's first pan-regional rival to Netflix, the world's biggest streaming TV platform service. But while Netflix is already in Australia and New Zealand and is scheduled to kick off in Japan this fall, iflix is already in Thailand, Malaysia and the Philippines with plans to focus on South East Asia initially before rolling out across the rest of Asia. The new investors are Malaysia-based Catcha Group and PLDT, the Philippines telecoms group.

Creative function: TV, film and video entertainment, distribution

Creative target: TV and movie producers, rights owners

Company: iflix, based in Kuala Lumpur, Malaysia

Key executive(s): CEO Mark Britt

Investors/Owners: Catcha Group; PLDT; Evolution Media Capital

Distribution platform: Internet; mobile apps

Launched: 2014

URL: www.iflix.com

###

Product: **Vessel**, subscription-funded next-generation video sharing platform

Need to know because the first venture by the former CEO of the pioneering Hulu, Jason Kilar, since leaving in January 2013. It has attracted US\$57.5m in a Series B round of funding. Vessel has been described as a combination of Hulu and YouTube. Its focus is to inject value into commissioned or acquired video shows by paying for exclusive windows on Vessel before the content is made available anywhere else online.

Creative function: video production, distribution, sharing

Creative target: video producers, entertainers, rights owners

Company: Vessel, based in San Francisco, California, US

Key executive(s): Co-founder/CEO Jason Kilar; co-founder Richard Tom

Investors/Owners: Greylock Partners; Bezos Expeditions; Benchmark; Institutional Venture Partners

Distribution platform: Internet; mobile apps

Launched: 2013

URL: www.vessel.com

###

Product: **WineVine.tv**, digital video channel for wine lovers

Need to know because it commercially launched in April to fill a gap in a global TV market packed with culinary shows but rarely any devoted to winemaking. Its programs are hosted by professionals targeting consumers interested in all things wine, ranging from "varietals to vintage; grape growth to winemaking, and retail to consumption." Founder Frank Brown is the former CEO of MTV Networks Asia Pacific. Content is supplied by branded content distributor Brand New Media (BNM) from offices in Australia, South East Asia, US and Europe.

Creative function: video production, distribution

Creative target: wine producers, retailers, marketers

Company: WineVine.tv, based in Sydney, Australia

Key executive(s): Founder/CEO Frank Brown; BNM CEO Perry Smith

Investors/Owners: Founding board members, including Frank Brown and Perry Smith

Distribution platform: Internet

Launched: 2015

URL: www.winevine.tv

###

S

tart-ups' Standpoint

The challenges start-ups face the moment they go public with their visions

Product/Service: Choosic – music discovery app

Developer: Choosic (London, UK)

When launched: October 2014

Targeted users/sector: 16 - 25 year olds with keen interests in emerging music, blogging and social networking

How will your technology change the industry you are in; what gap is it filling; what is the unique selling point? Current music services tend to favor well-established artists. Yet, there are thousands of musicians creating high-quality content and there isn't enough being done to improve the discoverability of this content. That's what we want to change. We want to help artists get discovered, and help listeners discover amazing music. Choosic is the fastest way to do this and build playlists of new music through half-curated and half-algorithmic recommendations within a playful app. Content is aggregated from over 600 tastemakers and processed through our recommendation engine before being delivered to users, who then decide whether they like or dislike songs. The 600 tastemakers are independent music blogs that we have selected and are not associated with Choosic. Our automated software gathers the content they recommend and delivers it to our users. We are a data-driven business that aims to solve the problem of music discovery and offer a new form of content delivery to innovate the music promotion space by providing targeted marketing to engaged music listeners, demographic feedback on unsigned content, and insights for both labels and independent artists.

How did you or the founders overcome your biggest fear when you realized the concept was becoming a business reality? I guess the fear of no one wanting to use your product or service is something I experienced, however any founder or business owner can avoid this by conducting enough market research and creating a minimal viable product. Which is exactly what we did; we learnt that a tremendous amount of people suffer from difficulty in discovering new music. Having a deep understanding of the market, the problem you are trying to solve and the end-user is crucial in validating your business.

Any recent developments to announce? Choosic is currently available on iOS and we're in the process of developing the app for Android, Windows Phone and the web. We're always improving and developing our recommendation engine and app features to enhance user experience. So far to date we've built a service used by over 23,000 users with no funding and our next steps are to secure investment. We recently won Music TechPitch 4.5 in London and won the London Entrepreneurs' Challenge in 2014.

Current investors: So far, Choosic has been completely bootstrapped. Three of us injected our own cash into the business and we've received multiple grants and prizes from competitions and schemes totaling up to £15,000 (US\$23,000).

Contact details:

URL: www.choosic.co

Twitter: @choosic

Email: chris@choosic.co.uk

###

Product/Service: Navigation Belt

Developer: Sensovo (Ludwigshafen, Germany; Bournemouth, UK)

When launched: April 2013

Targeted users/sector: Outdoor leisure activists; cyclists

How will your technology change the industry you are in; what gap is it filling; what is the unique selling point? We are developing Navigation Belt, the world's first wearable navigation system, a belt that is enhanced with motors that

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vibrate in the direction of a predefined destination. Despite the popularity of navigation systems, the devices currently available are either visual or audio-based, which might not be optimal for every user group or application because they require visual attention and the use of the hands. Cyclists and motorcyclists need to concentrate on the road, and runners might not like to waste time determining directions from the device screen. In addition, visually impaired people or patients with Alzheimer's disease may not be able to use visual information, and constant audio directions might be too distracting for them or not clear in noisy environments. By contrast, Navigation Belt utilizes the sense of touch to provide directional information to the users. The system consists of a smartphone app and a waist belt equipped with eight vibration motors along its length providing tactile feedback to direct the user. Using speech commands, the user can set a destination via the app, which is transmitted to the belt via Bluetooth. Satellite signals are then used to identify the user's location and provide navigation instructions via the vibration of the appropriate motors. Research in haptics shows that, after extensive usage, tactile feedback develops like a sixth sense, as it starts to be processed by the brain. Certain similar products are being developed by other groups, but there is nothing commercially available yet. Our strengths are lean design, enabling the user to wear the device under clothes, know-how in optimized vibration patterns, and an open platform API to enable third-party apps. Our first target group is outdoor enthusiasts, such as hikers and joggers, who don't like to be distracted by the constant need to check a smartphone for instructions. We are planning to expand to the cyclists market and also to activities where high precision navigation is required such as the needs of blind people and emergency services like the police and firefighters.

How did you or the founders overcome your biggest fear when you realized the concept was becoming a business reality? At first, we had concerns that our idea might be too niche and would not attract much interest from either customers or financial backers. However, believing in our idea while at the same time improving it by listening to feedback have resulted in our winning several innovation competitions and a list of people eagerly waiting for a release of the beta.

Any recent developments to announce? We were recently selected as a finalist in the UK-based IC tomorrow Wearable Technologies Innovation Contest. We are also starting the beta test of our app, soon to be followed by the beta test of the belt as well.

Current Investors:

ESA Business Incubator Centre (Germany).
EXIST, German government's "Hightech Strategy for Germany", co-financed by funding from the European Social Fund (ESF)

Contact details:

URL: www.sensovo.com

Twitter: @Sensovo

Facebook: facebook.com/sensovo

Email: contact@sensovo.com

###

Product/Service: Relevancy Data (Video recognition software)

Developer: Jukedeck (London, UK)

Developer: Relevancy Data (Amsterdam, The Netherlands)

When launched: August 2014

Targeted users/sector: Media companies; agencies; brands; programmatic platforms

How will your technology change the industry you are in; what gap is it filling; what is the unique selling point? Today's online tools for marketers are focused on behavioral targeting based on user web-browsing information, in particular, the pages they visit, the amount of time they view each page, the links they click on, the searches they make and the objects they interact with. These user actions allow sites to collect data, and other (behavioral) characteristics to create a user profile. Based on these profiles, advertisers push targeted ads to content provider websites for viewers. However, the needs of the industry's major ecosystem stakeholders (advertisers, content providers and users) are not efficiently met and the interrelationships lack more accurate relevancy. Advertisers often target the wrong

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audience, content providers do not get paid and viewers are often annoyed at having to view irrelevant video ads. Relevancy Data has developed a unique solution that scans millions of online videos using recognition technologies to detect specific elements in the video content. These elements include recognition of faces, logos, objects, gender, age and audio. Adding this new metadata to user profiles opens up new spaces) to display real-time, pre-roll ads within the video. Advertisers are therefore able to target users more precisely based on recognition of the video content being viewed, rather than just their demographics or web browsing behavior patterns. Our business model is primarily based on selling the data for a set price. However, we have also developed our own ad server network to run relevant online video campaigns across multiple content provider platforms. With this cutting-edge and patented technology, we connect advertisers, content providers and viewers, providing value for the entire ecosystem. Relevancy Data's vision is to become the leader in the online video advertising market.

How did you or the founders overcome your biggest fear when you realized the concept was becoming a business reality? The execution has been a challenge; this is a big market so we needed to decide what milestone to reach to make us relevant.

Any recent developments to announce?

January 2015: Graduate alumnus of Startupbootcamp Amsterdam (winner of Europe's best start-up accelerator program);

February 2015: First pilot campaign with a prestigious brand (BMW), proving our solution with a 42% increase in campaign ad views based on implementation of *the Relevancy Data* recognition solution;

New customer: FOX Sports;

Winner of the coolest pitch challenge in the world: Polar Bear Pitching on 24 February 2015 in Finland, where pitchers stand in a hole cut through the ice in freezing water during their pitch: (<https://www.youtube.com/watch?v=dOWTLZ9JOM#t=1600>)

Current Investors:
Startupbootcamp.org

Contact details:

Phone: 0031(0)627037635

Email: michal@relevancydata.com

URL: www.relevancydata.com

Linkedin: <https://www.linkedin.com/company/relevancydata>

Twitter: [@RelevancyData](https://twitter.com/RelevancyData)

Facebook: <https://www.facebook.com/RelevancyData>

###

Product/Service: RightsTrade (online marketplace for film and TV rights licensing)

Developer: RightsTrade LLC, (Studio City, California , US)

When launched: April 2014

Targeted users/sector: Users in the media and entertainment sectors: film and TV content owners; sales agents; studios; distributors; TV/cable/satellite networks; video-on-demand (VOD) platforms; airlines

How will your technology change the industry you are in; what gap is it filling; what is the unique selling point? Today, most film sales deals take six months or longer to close, which results in a huge amount of excess inventory right at a time when thousands of new VOD and other distribution platform buyers are entering the market. By connecting over 6,000 distributors with film and TV content owners through our marketplace platform, RightsTrade opens up more possibilities for buyers to find and license content, and sellers can close more deals faster. What makes it all work are cloud-based tools which simplify all of the administrative steps in the sales process – from sharing rights availabilities to screening content, negotiating, drafting and signing deals, and even automatically updating back-office systems with new contract terms. By making these tools available, we have taken an extremely complex licensing process and made it nearly as easy as renting a place to stay on Airbnb.

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How did you or the founders overcome your biggest fear when you realized the concept was becoming a business reality? Setting up a marketplace is one of the most challenging types of business to get off the ground because you have the chicken-and-egg dilemma between buyers and sellers. In addition, an online marketplace can easily appear as a threat in an industry where personal relationships are essential. We overcame these obstacles by first creating a secure screening platform, which meets a critical need in the licensing process. While there are a lot of screening platforms out there, few are tailor-made to properly support the needs of sales organizations and none, that I know of, sync with a company's back office metadata. By solving this specific administrative need, sellers soon sent out thousands of screeners to buyers all over the world who then became members of RightsTrade. Now that we have a critical mass of buyers and sellers on the platform, we are continuing this philosophy of introducing tools that make licensing easier at every step of the way, from sharing rights availabilities to screening, negotiating deals with an Airbnb-style DealWizard, and signing with DocuSign. We found that by innovating each of these steps in the process, we make buyers and sellers' jobs easier all the way from screening to signature.

Any recent developments to announce? Following the release of the screening platform and the search engine for available rights, we just released the revolutionary DealWizard, which allows buyers and sellers to negotiate terms, draft agreements, sign licensing deals, and track all deal-making activity 100% in the cloud. RightsTrade was awarded Best Startup in TV and Online Video at MIPTV, the industry-leading international TV and digital content licensing market, in April. With over 6,000 registered users, RightsTrade now has more content buyers than those attending any film or television market, and we are projected to have 12,000 members by the end of the year. Emiliano Calemkuk, former president of Fox Television Studios, recently joined RightsTrade's advisory board.

Current Investors:

Angel investors hold the majority stake
FilmTrack is a minority investor

Contact details:

URL: www.rightstrade.com

Facebook: facebook.com/rightstrade

Twitter: [@rightstrade](https://twitter.com/rightstrade)

LinkedIn: linkedin.com/company/rightstrade-llc

Email: info@rightstrade.com

steven.polster@rightstrade.com

jaimе.otero@rightstrade.com

###

Product/Service: TOK.tv (sports social platform)

Developer: TOK.tv (Palo Alto, California, US)

When launched: August 2013

Targeted users/sector: Sports fans; mobile consumers/users

How will your technology change the industry you are in; what gap is it filling; what is the unique selling point? TOK.tv is a voice-based social platform for sports fans. It allows them to talk to their friends, while watching a match on TV. It is designed to help soccer teams offer their fan base a unique engagement experience. The platform powers the official Real Madrid and Juventus apps, integrating its 'Social Button' and allowing supporters of the clubs to talk, send stadium sounds and take selfies. The TOK.tv Social Button includes ACR technology (automated content recognition) to identify advertising running in background by its audio. When there is a commercial on TV, TOK.tv presents a synchronized ad on the device, making the emotional branding advertisement clickable. When there is no ad on TV and the game is ongoing, ads are synchronized with the LED pitchside ads. TOK.tv collects the ad revenues and shares them with the team or league.

How did you or the founders overcome your biggest fear when you realized the concept was becoming a business reality? The panic kicked in when we saw how many users were connecting to our platform during a Juventus match. We had to scramble to adapt the software to manage the growth. Success can often cause a lot of pain. Now we manage over a million sessions during a game, and we can finally go back to watching the match instead of the servers.

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Any recent developments to announce? We now count more than 1.4 million users worldwide. Our users have taken 680K 'Social Selfies' to share with their friends. We see over a million sessions on game day. Next step is to launch with a few more clubs and leagues for the next season in August.

Current Investors:

Social Starts
Klein Ventures
XG Ventures
TEEC
IAG
Angellab
Individual angels

URL: <http://www.tok.tv>

Twitter: @TOKtvUS

Facebook: <http://www.facebook.com/Tok.tv>

G+: <http://plus.google.com/+TokTv>

LinkedIn: <http://www.linkedin.com/company/tok-tv>

YouTube: <http://www.youtube.com/user/TOKtvUS>

Pinterest: <http://www.pinterest.com/toktv/>

Email: info@tok.tv

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Contact details for all enquiries:

Editorial Director/Publisher Juliana Koranteng

Web: www.techmutiny.net

Email: techmutiny@btinternet.com

Twitter: @TechMutiny

LinkedIn: Juliana Koranteng

Advertising/Marketing: info@jaykaymediainc.com

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