LEADERSHIP INTERVIEWS


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Where do you see your company's comparative advantage or uniqueness in this crowded marketplace?

Tussai Our competitive advantage consists in the fact that we offer to our clients complete solutions, from licensing to the most diversified packaging. More than this, we are the only CDSA-certified company in the region.

Hosp Our strength resides in the way we deliver premium service packages to our customers. As a general contractor, we can look back on more than 25 years of experience in this challenging market. What makes kdg unique is certainly our special family spirit. Everyone in the team feels personally responsible for meeting the needs of our customers. Last, but not least, our location in the heart of the Alps also makes us special.

Evans Ever since we launched the company in 2000 we've had a pretty good split of music, film, TV and kids brands which has been great when one is going through a slow period. I also think we are seen as a very stable supplier, especially now we're part of the Goldcrest family, and one with a 12-year legacy of producing good work.

Hromadko Since becoming part of Kit Digital, a Nasdaq-listed organisation focusing on the future of digital content services, we've added bigger value to our digital supply chain, furthering downstream and upstream production across most of the digital content deliverables available today. Our offline global footprint far exceeds our competitors and our lead times in bringing facilities online can be very short. So, not only do we have the widest range of digital content services for modern screens, but we could potentially become the largest spread network for digital distribution.

Villaume The fact that we were Europe's first independent to move into Blu-ray gives a high level of credibility and experience. BD, though, has not yet proved itself to be a resounding success, despite being in the marketplace for now four years. Let's hope the arrival of 3D will change its fortune, in which we already participate.

Clarke In contrast to other companies, Silicon Philosophies are developers, suppliers, integrators and users of hard and software products. This affords the competitive edge of being able to develop, program, assemble and deliver goods and services – based on our own experiences and production needs.

Bisdas We always target clients' demands, being first to provide new services based on the latest technology, priced as competitively as possible.

Leye Verbatim is the Number One supplier of optical products worldwide which gives us significant economies of scale. Verbatim is owned by Mitsubishi Chemical Corp, and our success has been largely due to the quality of the chemical technology that we use which has been developed by them. We also sell a range of other products under the Verbatim brand (hard disk drives, flash memory products, accessories and LED lighting) which makes the company very stable in fluctuating markets.

Elia We have a broad range of technical experience across a number of different disciplines, so we can help clients balance their technical requirements using the right tools against their commercial objectives. We like to use the right tool for the right job.

Amongst the range of services you offer, which one grew over the past two years and which one diminished?

Tussai Content management and marketing-related special promotions are still on an increasing trend, constantly. Straigthforward replication has diminished as the retail market deceased.

Hosp We saw a sharp growth in our creative services, premium packaging and logistics, and a decline in manufactured discs on spindle.

Evans Blu-ray, Blu-ray 3D and mobile Apps have grown the most, which has also dragged along an increase in volume of DVD because most Blu-ray projects also need a DVD disc, and we started picking up work that we may not have had when only DVD was needed as in the past.

Hromadko For the past two years, Digital Cinema has shown the most dynamic growth for us as a company. Being a key player in multi-screen and multi-format workflow, Digital Cinema allows us to produce theatrical formats and downstream the production for Home Entertainment and IP deliverables. We've seen a fall in DVD production, but with the growth of Blu-ray and VoD, it shows a format rather than a market shift.

Villaume VOD and e-business are certainly our growth areas.

Clarke Demand for our 2D and 3D encoders for Broadcast and Video Post-production and VOD have grown steadily. Traditional DVD production-related products have fallen significantly, due to web-based delivery of low resolution video products and services.

Leye The optical market declined over the last two years, but it will continue to be a very important business for Verbatim because we are the largest global supplier and it is a major revenue contributor for the company. In parallel, the other storage businesses (hard disks, flash memory) grew significantly during this period.

Elia Certainly, Augmented Reality has been a big growth area for us during this time. Fewer people seem to be particularly interested in video delivery and distribution systems for web and mobile as many are quite happy to use the various commodity systems out there irrespective of their loss of brand.

Bisdas We experience a small growth in blu-ray authoring as the DVD authoring business keeps declining.

The non-home entertainment, corporate market is very substantial as far as DVD is concerned, rarely mentioned in statistics. Do you service this market segment as well?

Tussai Yes, we are trying to increase our involvement in the corporate market segment.

Hosp Yes, we've being servicing the corporate market from the start.

Evans We do some corporate work, but it's not our core business compared to home entertainment.

Hromadko Kit Digital is indeed very active in this market already. We provide communication via on-line video solutions for our clients and their customers, as well as internal video communication platforms for global businesses. We also offer content formatting solutions for the various applications used in the corporate market.

Villaume The corporate segment remains very small for us as percentage of turnover, and I suspect it will remain so in the future.

Bisdas We are not providing services for that area yet as there is not a big market here.

Clarke Yes, most corporate clients still request their productions to be authored for playback on DVD. This is usually because they use laptops and want to ensure playback of content by their sales force or end-customers.

Leye Verbatim is an important supplier to the non-home, non-retail market with a very strong position in the distribution channel all over Europe.

One hears alarmist opinions about the rapid demise of packaged media in the face of online delivery. What is your view as to how long discs will be around? And how do you plan this transition?

Tussai We agree that online delivery will take a significant share from the packaged media, but the latter will not disappear. Actually, the two formats will co-exist and complement each other.

Hosp Packaged media will remain an essential component in the business – bear in mind, we still suply vinyl! The level of unit sales will probably decrease. Our aim is to transform ourselves into a best service company that proactively meets the needs of its customers.

Evans I hear everyone reports of declining sales, but someone still needs to make the first one. Whether you sell 10 or 100,000 units, a DVD or Blu-ray master is still needed to be authored. The trick will be how you run your business to manage the inevitable decline in cost of those master units. We are determined to keep going after the bigger brands that will sell and sometimes devote bigger budgets. We do have plans for moving to online, but we are being patient and we don't see a massive rush or necessity to do do just yet.

Hromadko Discs will remain on the market for a few years still, but it will certainly become the lesser-desired medium in times to come. Kit Digital built its business on IP deliverables, platforms and solutions, so we are already preparing for the transformation and are opening up additional streams for digital content services.

Villaume There is no competition between online and packaged media. Simply put, the market must find a balance between the two, one being a 'dematerialised' media. The real challenge is the fight against piracy.

Bisdas I believe that packaged media will never stay out of the picture as CDs and even vinyl records still exist. But online will surely become dominant in the next ten years – at least in major markets as the US and Western Europe. We are planning to keep providing subtitling and encoding services for packaged media.

Clarke My predictions are the opposite! With all this hacking into the Playstation libraries, the film studios will soon recognise that 100% Copy Protection is a fallacy. Physical media and AACS are a "hindrance" to piracy, therefore high resolution movie and other content are less likely to be pirated when stored on disc than when they're floating around in the "clouds". Cloud-based distribution can be likened to flocks of sheep on fields surrounded by forests where wolves live – it's simply a question of time. We strongly discourage content distribution via digital delivery, and will avoid it at all costs.

Leye We believe that a huge number of consumers will always stay with packaged media and in-house storage for their data. There will be a decline in media sales, but there is a long, long tail to come.

Elia While I am deeply involved in the digital sphere I'd still rather buy someone a book than give them an Amazon voucher. There is still a perception of value in a physical product and I don't think that this will necessarily die off completely. However, there is a very clear decline in the sales of packaged media because they are not seen as being as "convenient" as their digital counterparts. Producers of packaged media know that they have to embrace digital media in order to survive, but for each piece of content that is available digitally, it erodes sales of packaged media. This is precisely one of the areas where we apply technology to bring those two sides together.

The unexpectedly rapid fall in price of Blu-ray discs, early in the commercialisation of the format, makes the economics of BD replication and authoring very challenging, especially in view of the heavy investment required. What needs to happen to make it a viable, long-term business for independents?

Tussai The local market is at a very early stage in the development of Blu-ray. However, Eastern Europe is characterised for its "big steps" in development. Often industries reach maturity, even "burn-out" phase at an intermediary stages. There is an obvious need for more and proper content for BD which could increase the volume of this market segment and could nurture further developments.

Hosp What is required is attractive content with the BD discs being marketed professionally in order to attract the attention of the consumers. But, it's all about content…

Evans This is easy: prices for what we do as an authoring company need to stabilise.

Hromadko Re-releasing back catalogue theatrically has proven to be increasing Blu-ray sales, but this only works on bigger titles with substantial street prices. Releasing triple play box sets (DVD+BD+ Digital Copy) is an innovative idea that give consumers a choice of format for different players in their homes and mobile players.

Villaume Indeed, we are very concerned with the sharp fall in manufacturing price given the extremely heavy investment that Blu-ray lines requires. At least this downward spiral in price is leading to a noticeable growth in BD sales volumes.

Bisdas To be a long-term format – at least in Greece – independents must invest in cheaper software and use HD material from files or HDCAMs in order to reduce the costs.

Clarke The greatest hindrance in profitability lies in the following: high AACS costs; unwillingness of customers to pay reasonable production and authoring prices; pressure from customers demanding more features for less money; some studios offer BD plus DVD pre-mastering (combined) for rock-bottom prices. The practice of price-dumping needs to stop. Studios are hurting themselves by undertaking productions at or below cost! Unless the industry settles on standardised prices to guarantee profitability – highly unlikely – the situation will remain dire.

Elia It's more a question of ensuring that as many consumers (and indeed businesses) are Blu-ray-enabled as possible. People won't buy into Blu-ray if they don't have a machine to play it on, either in consumer electronics or on their computer.

Do you see the arrival of 3D as the shot of adrenaline the Blu-ray disc format badly needs to progress in the market, or do you think consumers will make a success of Blu-ray irrespective of whether 3D develops?

Tussai Probably, the demand for Blu-ray Disc will increase rapidly as 3D is going to be spreading into the market.

Hosp The real question is who is driving 3D? Who is seriously focusing on it? The other point is that while some movies are excellent for 3D others aren't. Apart from this, the consumer electronics industry needs to get involved and push this development.

Evans Only if the powers that be use 3D as part of an overall campaign to improve consumer awareness of Blu-ray as a format. On its own 3D won't rescue or make up for the shoddy introduction of the BD format to the world.

Hromadko 3D Blu-ray is driven by television manufacturers. It's imperative for hardware manufacturers to delivery the future in functionality to drive TV sales. With active shutter glasses being a short-term solution and the focus currently being on passive systems and glasses-free systems, 3D will certainly boost the 3D – and 2D – Blu-ray markets in the years to come. The next wave of gaming consoles will drive 3D in the home even further.

Villaume Unquestionably YES, and we think 3D will save Blu-ray.

Clarke This is the case in Germany, Austria, France and Scandinavia, but not in the eastern European countries. Consumer acceptance of Blu-ray devices and technology is almost non-existent in Italy, for example. Content drives interest – not vice versa.

All TV stations in Germany are required by law to offer HD broadcast by 2012. This form of regulation will encourage consumers to purchase HD-capable devices in order to enjoy these broadcasts.

Prices of 2D televisions and players have fallen dramatically and new 3D devices offer so many improvements and features over their predecessors, that purchasing these are seen as cost-effective, sensible and practical investments.

Bisdas 3D is another marketing trick in order to sell new equipment and make major companies richer. I do not think 3D is well standardised and it has a lot of problems to be solved until it successfully enters the home entertainment. The high definition quality by itself can be the USP for Blu-ray and make the difference from DVD.

Elia Admittedly, I think it actually adds a layer of expense and complexity which is undesirable at the moment. The consumer electronics companies spent a lot of time ramming HD down everyones' throats when there really wasn't sufficient content to justify it. In fact, the largest source of HD content is only 720p and not 1080p anyway so that hasn't made purchasers of the latter particularly happy. There are a number of early adopters who will buy 3D screens already, and some of them probably even ditched their "HD-ready" TV to do it. Idiots.

3D technology is a compelling add-on value for Blu-ray, but the technology on the periphery just isn't sufficiently appealing or cost-effective enough to justify mass market acceptance.

Do you think Blu-ray discs will eventually replace DVDs completely or will they only partially replace them, becoming a niche, albeit big?

Tussai We think that Blu-ray discs will replace slowly and only partially DVDs, at least on our local market.

Hosp Not in the short term. DVD is still the main mass media product for home entertainment. Blu-ray still has the reputation of being a niche product for people who like innovations.

Evans I think they'll live along side each other for a few years, but if the whole cost cycle for Blu-ray starts to equal that of DVD we may have another story. Blu-ray could do better, but the industry has to address the appalling efforts to promote the format to the consumer. Even five years on, too many consumers do not understand the format even to the point of realising that they can play their existing collection of DVDs – and CDs – in a Blu-ray player!

Hromadko It's not likely to completely replace DVD on its own. It's my belief that the market will ultimately be divided between Blu-ray and IP, which will collectively mark the demise of DVD.

Bisdas For home entertainment in the next ten years I think DVD will be replaced by online SD content or HD and Blu-ray.

Clarke In view of the installed base of inexpensive BD players, PS3s, computers with burners, reliable 25/50GB media, plus the planned release of discs with much higher storage capacity, BD will eventually completely replace DVD.

Leye Blu-ray will not be able to replace DVD; it will remain a complementary product. BD already has strong competition from hard disc storage solutions. The Blu-ray storage market will increase, but will not become as big as DVD-R or CD-R. However, we foresee a strong market for BD media.

Elia It's likely that Blu-ray discs will replace DVDs, but like DVDs and CD-ROMs before them, they will only gain mass-market acceptance once the price comes down. Blu-ray is appealing to consumers not because of all the extra features on prerecorded products, but because of the extra storage capacity. People are now hitting the limits of a 4.7Gb (DVD) disc as they have more content to back up and share with higher resolution digital cameras and camcorders. CD and DVD writers were extremely expensive when they first hit the market, but volume soon drove the price down. If Blu-ray writers are able to reach the same critical mass as CDs and DVDs before it, Blu-ray will have taken over.

Villaume I think we will still manufacture DVDs for many more years to come…

Do you thing 3D is here to stay or consumer interest in stereoscopy will be temporary?

Tussai We think that this format is still developing and for the moment it is not researched enough and fully finalised. Probably, the current 3D system will be replaced with an improved product.

Hosp It will likely stay a niche within a niche, perhaps. It depends on the development of glasses-free auto-stereoscopic systems.

Evans I believe if the powers that be can forcefully communicate the excitement of 3D from the cinema into the home then it has a fighting chance.

Hromadko This is the first time ever that excellent 3D results are matched with reasonable distribution costs. In the past, 3D relied on anaglyph systems in cinemas and TV sets or on an expensive synchronization process of two video sources. Now with advanced digital intermediate processes in post-production, adoption of the format can be achieved much more easily and at a lower rate, making it more affordable to bring it to the market.

Villaume Convergence between TV programmes, theatrical films and Blu-ray when it comes to 3D give us some comfort as to the successful penetration of 3D Blu-ray.

Bisdas To stay or not to stay, that is a question for the 3D manufacturers that cannot decide whether to go for a system with glasses or without glasses.

Clarke 3D is no longer just a novelty, but is steadily being adapted into production and post-production activities. As the availability of film, video, advertising, training and educational content increases, so will consumer interest. Content is king!

Elia 3D has come and gone several times over the years, but I think we may be about to make it happen. 3D in cinema is now quite commonplace and even expected. The move towards greater use of CGI has made production of stereoscopic imagery easier and cost-effective. Furthermore, a dramatic cost reduction in 3D cameras from the expensive, noisy and power hungry IMAX cameras has put 3D within reach of more producers. The only remaining challenge is getting 3D to extend further than cinema.

Films on solid state/Flash memory, Holographic discs, 4,000-line Super HDTV are advanced technologies at varying stages of development. Do you see any entering the consumer market and, if so, in what time frame?

Tussai There are certain technologies that could have a strong impact on the optical disc market. We estimate that these various technologies listed could gain 10% to 25% share of the consumer electroncs market over three to five years.

Hosp It depends whether or how fast cloud technology will become a key factor in the industry.

Evans Not in my working lifetime. How can these new technologies or devices boasting even better quality be taken to the market and be a success when the world struggles to accept Blu-ray on a disc the same size of CD and DVD that's been around for decades?

Hromadko As mentioned, holographic projection will certainly bring a new dimension to the consumer, allowing audiences to be part of the scene, the final step to virtual reality. Surely, the race for better resolution, sharper sound and faster frame-rates will enhance the experience, but this isn't what will revolutionise the great breakthrough in home entertainment.

Clarke This is still a long way off as 4K success depends very much on 3D's acceptance and integration.

Villaume Yes, in 2017.

Leye Other technologies have different benefits and disadvantages. 12cm optical discs provide an inexpensive format for reliable longer-term storage which consumers are very familiar with and, for what it does, today we cannot see it being replaced by other storage formats.

Elia Films on solid state storage did attempt to enter the market a few years ago. The format is certainly a very interesting one because it isn't bound by the same capacity limitations as current optical media. It's also a good deal more compact, and an increasing number of TV and player manufacturers are including both USB and SD support.

However, the issue that will come back to bite everyone is the encoding format. Many devices opt for DivX, which is a (largely) proprietary one and requires devices to be licenced. This may be tricky to sustain and I can see the industry looking for something else in the same way as the W3 consortium has scoured the world to find an open enough video format to back HTML5. Also, there is the packaging of interactive content. It's unlikely that this would use BD-Live as content is a bit too heavy.

An increasing number of manufacturers are moving into solar panel/cell segment, which they reckon has more potential than packaged media. Is there enough synergy between the two industry sectors to warrant such a move? Are you considering expanding your activities in the solar business as well?

Tussai Yes, there is a possibility we could consider expanding our activities into solar business, but it depends mostly on the local political and regulatory environment, which has to improve the legislation regarding green energy.

Hosp With our kdg energy company our shareholders have already decided to step into the field of renewable energies. There are remarkable synergies between the two sectors especially in process management and infrastructure. Such diversification is a strategy, there's no doubt about it.

Hromadko I don't envisage a synergy between these two industries, unless the companies producing the optical media already have adoption technology in place. The solar business is already over saturated with European and Chinese product and there is not much room for other players in this market.

Villaume In fact, the appropriate portfolio of activities rests on a correct strategy deployed by replicators today. For a replicator very present in the games and audio sectors, but less so in the video sector, the solar business certainly represents an important diversification. Remember that independent replicators do not manufacture Blu-ray games titles, which is the exclusive preserve of Sony, apparently…

Clarke We have no plan at present to enter this market.

Leye Our parent company Mitsubishi Chemical is actively involved into the solar segment but, as of today, we don't know whether this will be a business that Verbatim will become involved in.

Diversification is claimed to be the best way of staying afloat in the face of market uncertainty. How do you see your company's range of services evolving over the next 2 to 5 years?

Tussai We have developed our fulfillment and packaging activities for other products, not related with our industry. We are in the process of analysing other developments as well.

Hosp With our new division kdg mediadirect we have just launched our direct sales and e-business operations. The goal is to provide customers with a complete range of services, right through to the end-consumer. Our consultancy work will therefore take on an even more important role as it will be essential for media business to be present in each and every channel.

Evans I think we'll still be producing DVD, Blu-ray and Apps as a lot of our work is producing for some of the larger brands that will exist and will want to be bought and sold on the platforms. As part of Goldcrest, we have plans to develop more joint services like broadcast graphics and other more post-based services that require a high level of creative input.

Hromadko We see 3D gaining momentum in the digital content sector. It's already standardized for Cinema and Blu-ray, thus we see it being the biggest driver for future platforms like the Internet and IP televisions. This will have major impacts on long-term industry shifts, and companies like ours will have to be ahead of the curve to cope with the transformations and deliver seamless integrations for content providers.

Villaume We are becoming ever more a services company and moving away from purely manufacturing activities.

Bisdas We are adding new services and we will keep strengthening our presence in the next five years as the local market is getting smaller and new markets must be approached.

Clarke For quite some time we have followed and evangelised the strategy I call "Diversify or Die". Additionally, we base much of our success on collaboration, whereby the synergy of our individual partners allows us to create package or modify our products and services as needed. We anticipate growth in our range of services and deployment of new products as we focus on evolving markets and broaden our customer base to households, schools and communities.

Leye Over the last couple of years Verbatim diversified into a number of different storage markets, notably hard drives and flash memory, and we will continue to look at other opportunities in the future. For instance, cloud storage is something that we are certainly considering adding to our portfolio sometime soon. In addition, in 2010, Verbatim launched its range of LED lightning product, based on the huge experience and production capacities of our parent company Mitsubishi Chemical.

Elia In fact, since we first started, there hasn't been any slowdown in the rate of new technologies appearing, and indeed our need to adapt to them. We can't stay expert in a particular area for long because it's quickly superseded by another more advanced one. However, what we always aim to do is not to chase the "bright, shiny light" but to evaluate the most robust and commercially-viable technologies with which to help our clients. That hasn't changed in the last fifteen years of being in this field and so I'd envisage that the next five years will be no different!

Do you think the consumer take-up of 3D depends on the arrival of glasses-free autostereoscopic systems. If yes, how many years do you believe consumers will have to wait for a high-quality glasses-free system to match the existing shutter glasses 3D systems?

Tussai Yes, we agree that 3D depends substantially on glasses-free systems; maybe in three years?

Hosp That's a question for the consumer electronics industry. Undoubtedly, the supply chains will need something new to keep prices at a premium.

Evans I think that if we expect the success to 3D to rest entirely on the acceptance of glasses-free systems then we are already on the wrong path and too late. Get consumers interested and excited in standard Blu-ray NOW and excite them further with 3D NOW. The glasses-free systems will then become an even further exciting development and not the hope that it might save the new format.

Hromadko I personally believe that the next generation of 3D viewing will be holographic projection, a new way for showcasing content that should be available within the next 10 years or so. Auto-stereoscopic displays are limited by resolution, number of viewers and many other contributing factors. The experience will only improve and, yes, you'll certainly see 3D without glasses in the future, but this will only work on some platform, not really in cinemas.

Villaume Undeniably, the necessity to wear glasses will slow the introduction of 3D. However, they will be indispendable until at least 2014.

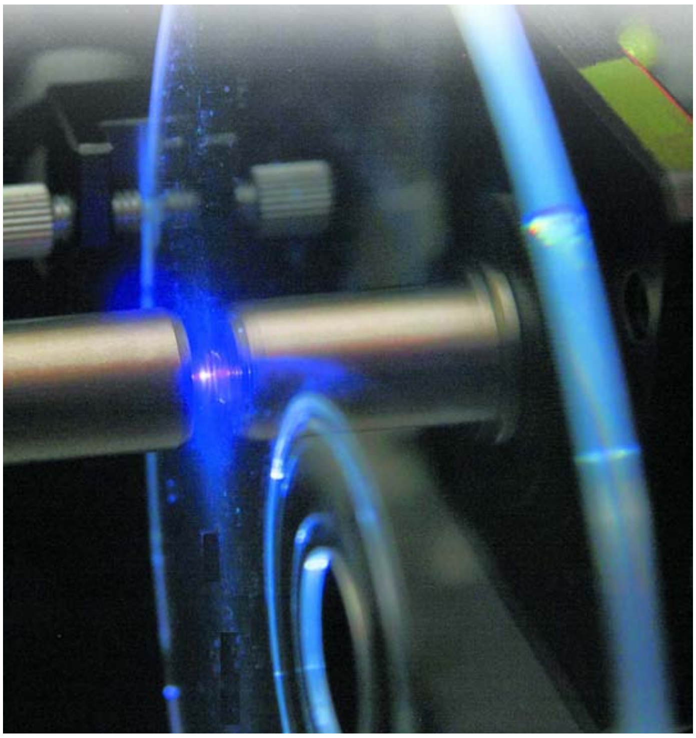
Bisdas For me glasses are a big drawback. If there were glasses-free TV system then, yes, Blu-ray will have another strong card compared to SD and DVD.

Clarke This is again a regional and cultural issue. In Germany, some retail stores gave away multi-colored passive glasses, which can be used with the new LG 3D televisions and also in the cinema. Teenagers and kids enjoy the variety of colors and consider wearing them as being "cool."

This is the greatest motivating factor, since most parents buy products for the benefit and enjoyment of their kids. These same teenagers and young adults represent the future customer base for 3D and related electronic products.

Elia That's certainly a significant factor, but the overall price is probably the greater challenge. The glasses themselves are expensive and in any household with young children, it's quite likely that many would need to be replaced on a regular basis. Parents would also be concerned about their children having to wear glasses just to watch TV!

There is also the perception of potential health dangers with wearing these types of glasses, especially as a number of 3D glasses are calibrated by default for an adult wearer.



A last word?

Hosp With regard to royalties, our industry is still unwilling to learn from its mistakes. Blu-ray presents the same unfair situation that exists for DVD since the royalty question has not yet been clarified for all players in the field. Why didn't the patent holders decide to set up things differently? Why didn't they combine it with AACS in order to make it more transparent to customers?

As anyone can see, replication prices are falling rapidly and the BD life-cycle will definitely be shorter than that of DVD. Unfortunately – and that is not just a rhetorical question – how will the huge investments in Blu-ray be paid back, at least for independent replicators?

Evans Taking the risk of upsetting some in the industry, I think the authoring business is in a dire state. I don't seen how anyone would ever want to invest in setting up an authoring facility to service the next five years when the economics are ruined. Unless you're already established and have paid off all or a substantial chunk of your equipment, I don't see how anyone can make profits worth the pains and efforts.

All I've seen in the last three years are colleagues closing their authoring facilities or turning them towards other services – no one is setting up or expanding their authoring operations. Will we reach a point where there will be a demand for authoring, with no one able to satisfy it, at least at a level the consumer expect in terms of quality?

Volume sales may be dropping, but a master still needs to be produce, and I worry we've reached a point where it's no longer sustainable for many companies to offer this service. The Pavement is lucky in many ways. We've been around since 2000 and with the mix and scale of some of our work I know what authoring we can offer in the coming years, but I also know my own desirable capacity target.

Hromadko It's a very interesting and exciting time for the entire digital supply chain. I see a very strong future in the IP sector; it will ultimately become the final frontier for content delivery, packaging and multi-platform distribution.

Cloud-based systems offer complete interoperability between various playback devices, offering the consumer more choices on output deliverables than ever before.

Bisdas BEWARE of YouTube!!!

Clarke If you follow what's going on in the professional world of stereoscopic 3D you will discover just how much is being already done worldwide in 3D production.

Leye It will be interesting to see other storage formats evolve, although it is not clear at this stage which of the formats on the horizon will dominate in the future.

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