

# IDC MarketScape: Worldwide Media Production, Distribution, and Monetization Integrated Cloud Solutions 2025 Vendor Assessment

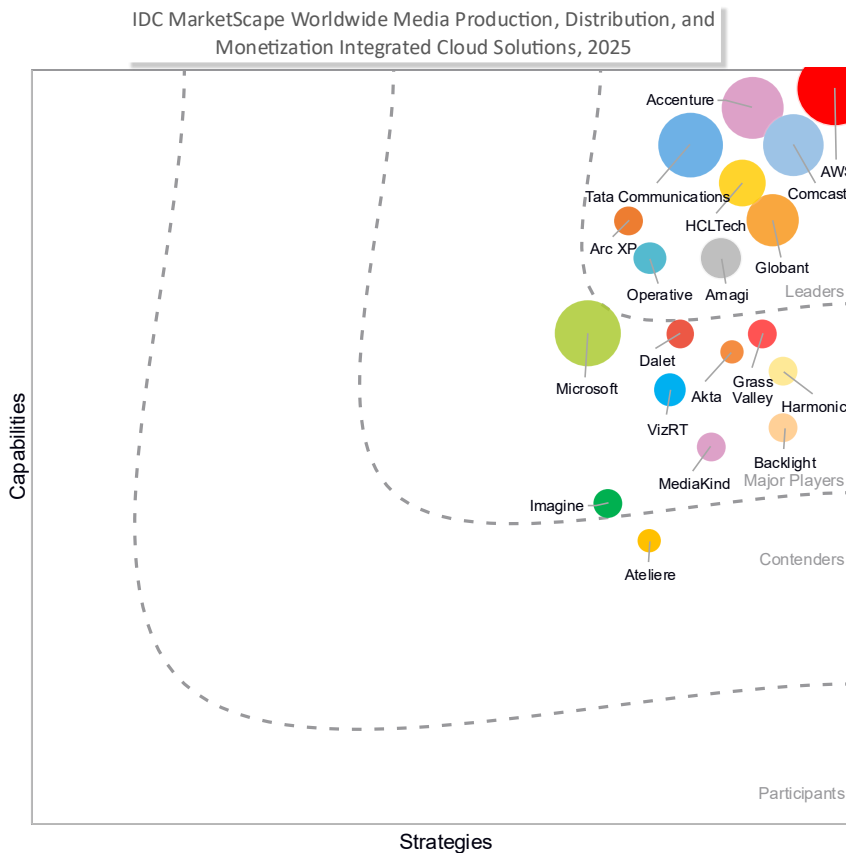
Alex Holtz

**THIS MARKETSCAPE EXCERPT FEATURES TATA COMMUNICATIONS AS A LEADER**

## IDC MARKETSCAPE FIGURE

**FIGURE 1**

### IDC MarketScape Worldwide Media Production, Distribution, and Monetization Integrated Cloud Solutions Vendor Assessment



Source: IDC, 2025

Please see the Appendix for detailed methodology, market definition, and scoring criteria.

## IN THIS EXCERPT

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The content for this excerpt was taken directly from IDC MarketScape: Worldwide Media Production, Distribution, and Monetization Integrated Cloud Solutions 2025 Vendor Assessment (Doc #US52989125).

## IDC OPINION

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The native cloud-based unification of production, distribution, and monetization is reshaping the media industry in 2025 and is poised to accelerate further into 2026. This transformation is driven by the need for agility, scalability, and cost efficiency in an increasingly competitive and fragmented media landscape. Traditional media companies are evolving into "media-tech enterprises," leveraging cloud-native technologies to streamline operations, enhance collaboration, and unlock new revenue streams.

At the core of this shift is the integration of cloud-based workflows across the entire content life cycle — from creation to consumption. Cloud platforms enable real-time collaboration among geographically dispersed teams, allowing for faster content production and more efficient resource allocation. This is particularly valuable in a world where remote work and global content delivery are the norm. The scalability of cloud infrastructure allows media companies to dynamically adjust resources based on demand, reducing capital expenditures and shifting to a more flexible, pay-as-you-go model.

Distribution has also been revolutionized. Cloud-native systems support multiplatform delivery, ensuring content reaches audiences across streaming services, social media, and traditional broadcast channels with minimal latency. This unified approach enhances audience engagement through personalized content recommendations powered by artificial intelligence (AI) and machine learning, which are seamlessly integrated into cloud ecosystems.

Monetization strategies are evolving as well. Cloud platforms provide granular analytics and real-time data insights, enabling media companies to optimize ad placements, subscription models, and content licensing. This data-driven approach enhances revenue generation while improving user experience. Furthermore, the cloud facilitates rapid experimentation with new business models, such as microtransactions or tiered content access, without the need for significant infrastructure changes.

Overall, media companies in 2025 must navigate a complex landscape of rising costs, technological advancements, regulatory challenges, and shifting consumer preferences to remain competitive and sustainable. The worldwide media industry is undergoing a significant transformation driven by cloud technologies, data insights, and artificial intelligence. This transition is reshaping streaming turnkey solutions, unifying production, distribution, and monetization processes.

Media companies are leveraging cloud infrastructure to scale their operations efficiently, allowing for flexible storage, processing, and distribution of content, accommodating fluctuating demand and reducing costs. Cloud-based tools facilitate collaboration among geographically dispersed teams, enabling remote production and real-time editing. With the decline of third-party cookies, media companies are increasingly relying on first-party data to personalize content and enhance viewer engagement. AI-driven analytics are used to predict viewer preferences, optimize content recommendations, and improve advertising strategies.

AI technologies, including machine learning and natural language processing, are revolutionizing content creation by automating tasks such as video editing, content classification, and quality control. AI enables hyper-personalized viewing experiences by analyzing user behavior and preferences, leading to tailored content delivery. Turnkey solutions are integrating production, distribution, and monetization into single platforms, streamlining workflows and reducing operational complexity. Advanced AI and data analytics are enhancing monetization strategies through targeted advertising, subscription models, and dynamic pricing.

The continued convergence of AI, cloud, and edge computing is expected to deepen this transformation into 2026. Media companies that fully embrace cloud-native unification will be better positioned to innovate, respond to market shifts, and deliver compelling, personalized experiences at scale. The cloud is no longer just a tool; it is the foundation of the modern media enterprise.

## **IDC MARKETSCOPE VENDOR INCLUSION CRITERIA**

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This IDC MarketScape for worldwide media production, distribution, and monetization integrated cloud solutions focuses on consultation, design and integration, project management and deployment, training, and cloud-based unified production, distribution, and monetization. The term *unified* is defined as a platform that provides a seamless process and application services across all three pillars of production (live and postproduction and playout), distribution (connected TV [CTV], mobile, and web), and monetization (advertising, subscription, and transactional services). The focus is on best practices in consultative services and strategic planning, design, integration, and the adoption and use of advanced technologies such as artificial intelligence or generative

AI (GenAI), agentic AI, AI agents, and data analysis and insights to provide real-time integration into business operations for intelligent decisioning as media companies drive toward profitability as their main focus. The coverage will be worldwide and only focuses on major market share technology vendors that offer solutions worldwide. Vertical markets served include broadcast television stations, networks, and media programmers for over-the-top (OTT) streaming services and distribution in addition to motion picture studios with direct-to-consumer business models.

## Inclusion Criteria

- Any vendor participating in this IDC MarketScape should be able to showcase that it generates at least \$50 million in revenue annually for its M&E consultation, design and integration, project management and deployment, and cloud platform, applications, and services practice worldwide.
- A vendor should also be able to showcase that at least 10% of its services revenue and 10% of its resources belonging to its M&E cloud practice span across each of the three IDC defined macroregions namely Americas, EMEA, and APAC and achieved this in 2024 to demonstrate global scope.

## ADVICE FOR TECHNOLOGY BUYERS

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- Media companies should prioritize the integration of cloud-native solutions to streamline and unify production, distribution, and monetization processes, leveraging AI and automation to enhance operational efficiency and audience engagement.
- Media companies should engage with consultants, systems integrators, and technology vendors that understand the entire business cycle and use cases across business operations, media orchestration, production, distribution, and monetization.
- Media companies should also expect to partner with consultants, systems integrators, and technology vendors that have validated experience and the financial knowledge to develop a business plan focused on total cost of ownership, breakeven, and profitability objectives from initial concept ideation through solution deployment including road map enhancements through the introduction of AI and data insights throughout the business cycle for intelligent decisioning.
- Technology buyers should evaluate vendors based on their ability to provide end-to-end solutions that unify media workflows, ensuring compliance with data privacy regulations and offering robust security measures to protect content assets.

- Decision-makers should consider partnerships with vendors offering modular and scalable platforms that support hybrid and cloud-native environments, enabling seamless transitions from legacy systems and facilitating global content delivery.
- Industry leaders should focus on adopting advanced monetization strategies, such as dynamic ad insertion (DAI) and personalized content recommendations, to optimize revenue streams and improve viewer retention.

## FEATURED VENDOR PROFILE

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This section briefly explains IDC's key observations resulting in Tata Communication's position in the IDC MarketScape. The description here provides a summary of the vendor's strengths and challenges.

### Tata Communications

After a thorough evaluation of Tata Communications, IDC has positioned the company in the Leaders category in this 2025 IDC MarketScape for worldwide media production, distribution, and monetization integrated cloud solutions.

Tata Communications plays a pivotal role in transforming the media industry by offering a comprehensive, cloud-native solution that unifies production, distribution, and monetization workflows. Through its Media Cloud Ecosystem, Tata Communications enables broadcasters, content owners, and OTT platforms to build modular, private media clouds on its Vayu Cloud Platform. This infrastructure-as-a-service model is optimized specifically for media applications, supporting everything from live capture and transcoding to metadata management and multiplatform publishing. The platform is tightly integrated with Tata's global media-grade network, ensuring seamless content contribution and distribution across geographies. Its transparent pricing free from egress, retrieval, or API call fees adds to its appeal by simplifying cost structures. In addition, the solution supports advanced media asset management, digital rights management, and video analytics, making it a true turnkey offering for media enterprises seeking agility, scalability, and operational efficiency in a cloud-first world.

Tata Communications offers a robust suite of cloud-native products and services tailored to unify production, distribution, and monetization for the media industry. Its Media Cloud Ecosystem is a modular, cloud-native platform that enables media companies to build private media clouds, supporting the entire content life cycle from live capture and ingest to transcoding, metadata management, and multiplatform publishing while integrating seamlessly with Tata's global media-grade network. Its Global Contribution and Distribution Solutions include both specific media

infrastructure and a consultative-led, managed services approach, providing hybrid contribution and distribution models that combine dedicated media-grade fiber, internet-based compressed video transfer, and satellite distribution. This ensures high-quality, resilient, and cost-effective global content acquisition and delivery, especially for live events and remote production. Tata enhances content ingestion, enrichment, localization, and metadata management through AI-driven content supply chain modernization, streamlining workflows, reducing manual intervention, and enabling faster, more accurate content delivery across OTT, FAST channels, and traditional platforms. Its monetization and personalization tools include AI-powered features like dynamic ad insertion, personalized content recommendations, and advanced analytics, helping media companies optimize revenue streams and improve audience engagement. The platform also includes security and compliance features such as digital rights management (DRM), forensic watermarking, and real-time threat detection to protect content assets and ensure regulatory compliance across regions. In addition, Tata Communications offers end-to-end managed services for deployment, monitoring, and support, ensuring smooth operations and rapid issue resolution through its global media service operations centers.

Together, these offerings make Tata Communications a comprehensive partner for media enterprises seeking a turnkey, cloud-first approach to unify their production, distribution, and monetization strategies.

## Strengths

The following is a summary of Tata Communications' key strengths in serving the media industry's need for a unified, cloud-native turnkey solution for production, distribution, and monetization:

- **End-to-end media cloud infrastructure:** Tata Communications offers a comprehensive suite of services through its Media Cloud Infrastructure, including storage, compute, and integrated media supply chain tools. This enables media companies to build and manage custom workflows entirely in the cloud or at the near and/or far edge.
- **Modular and scalable architecture:** Its infrastructure is modular and flexible, allowing media customers such as broadcasters and content owners to scale operations without significant capital expenditure. This is especially valuable for dynamic workloads like live events or seasonal content spikes. Its multifaceted services span the entire service spectrum right from modular media-specific infrastructure through to consultative-led, fully managed and operated services catering to legacy, on-premises use cases to next-gen cloud-native architectures.

- **Global reach and network backbone:** Leveraging its global network, Tata Communications ensures low-latency, high-bandwidth connectivity, which is critical for real-time production and distribution across geographies.
- **Integrated Media Hub:** The Media Hub solution streamlines ingest, transformation, review, and publishing processes, helping unify production and distribution workflows under one platform.
- **Innovation in immersive media:** Tata has demonstrated proficiency in cutting-edge formats like 8K 360-degree video and VR, positioning itself as a forward-thinking partner for next-gen media experiences.

## Challenges

While Tata Communications addresses many of today's modern requirements, challenges do exist including the following:

- **Market competition:** Tata Communications competes with cloud-native media service providers that often have deeper integration with AI/ML tools and broader developer ecosystems.
- **Perception as a telecom-centric provider:** Despite its capabilities, Tata Communications is still often perceived as a telecom and infrastructure provider, which may limit its appeal to media companies seeking more software-centric or creative solutions.
- **Complexity of integration:** While Tata offers modular services, true unification of production, distribution, and monetization still requires significant integration effort, especially for legacy media companies with fragmented systems.
- **Monetization tools maturity:** Compared with specialized platforms, Tata's monetization capabilities may not yet match the depth of analytics, adtech integration, or rights management offered by niche vendors focused solely on revenue optimization.

## Consider Tata Communications When

A media company should consider Tata Communications for building a native, cloud-based, unified, turnkey solution combining production, distribution, and monetization when the following conditions align:

- **Global contribution and distribution needs:** If the company requires low-latency, high-bandwidth global content acquisition and delivery, Tata's robust global network backbone is a major asset.
- **Desire for modular, scalable architecture:** A media company should consider Tata when it wants to start small and scale adding capabilities like live production, OTT distribution, or monetization modules over time.

- **Transitioning from legacy infrastructure:** For media firms moving away from on-premises or hybrid systems, Tata's cloud-native media services can help modernize workflows without a full rip and replace.
- **Need for end-to-end workflow integration:** A media company should consider Tata if the goal is to unify fragmented production, postproduction, and distribution pipelines into a single cloud-based platform.
- **Live events or sports broadcasting:** Tata's experience with live video transport, remote production, and immersive formats (e.g., 8K, VR) makes it a strong partner for high-profile live content.
- **Emerging market expansion:** For companies expanding into Asia, Africa, LATAM, or the Middle East, Tata's regional presence and infrastructure offer a strategic advantage.
- **Security and compliance requirements:** When data sovereignty, content protection, or regulatory compliance is critical, Tata Communications' enterprise-grade security and managed services are a strong fit.

## APPENDIX

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### Reading an IDC MarketScape Graph

For the purposes of this analysis, IDC divided potential key measures for success into two primary categories: capabilities and strategies.

Positioning on the y-axis reflects the vendor's current capabilities and menu of services and how well aligned the vendor is to customer needs. The capabilities category focuses on the capabilities of the company and product today, here and now. Under this category, IDC analysts will look at how well a vendor is building/delivering capabilities that enable it to execute its chosen strategy in the market.

Positioning on the x-axis, or strategies axis, indicates how well the vendor's future strategy aligns with what customers will require in three to five years. The strategies category focuses on high-level decisions and underlying assumptions about offerings, customer segments, and business and go-to-market plans for the next three to five years.

The size of the individual vendor markers in the IDC MarketScape represents the market share of each individual vendor within the specific market segment being assessed in this case being within the media and entertainment industry.

## IDC MarketScape Methodology

IDC MarketScape criteria selection, weightings, and vendor scores represent well-researched IDC judgment about the market and specific vendors. IDC analysts tailor the range of standard characteristics by which vendors are measured through structured discussions, surveys, and interviews with market leaders, participants, and end users. Market weightings are based on user interviews, buyer surveys, and the input of IDC experts in each market. IDC analysts base individual vendor scores, and ultimately vendor positions on the IDC MarketScape, on detailed surveys and interviews with the vendors, publicly available information, and end-user experiences to provide an accurate and consistent assessment of each vendor's characteristics, behavior, and capability.

## Market Definition

This IDC MarketScape for worldwide media production, distribution, and monetization integrated cloud solutions focuses on consultation, design and integration, project management and deployment, training and, most important, the focus on cloud-based unified production, distribution, and monetization. The term *unified* is defined as a platform that provides a seamless process and application services across all three pillars of production (live and postproduction and playout), distribution (connected TV, mobile, and web), and monetization (advertising, subscription, and transactional services). The focus is on best practices in consultative services and strategic planning, design, integration, advanced technologies such as artificial intelligence (AI) or generative AI (GenAI), and data analysis and insights to provide real-time integration into business operations for intelligent decisioning to drive toward profitability. The coverage will be worldwide and only focuses on major market share technology vendors that offer solutions worldwide. Vertical markets served include broadcast television stations, networks, and media programmers for over-the-top (OTT) streaming services and distribution in addition to motion picture studios with direct-to-consumer business models.

## LEARN MORE

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### Related Research

- *Managed Multicloud Best Practices, 2025* (IDC #US53386825, May 2025)
- *NAB 2025 Insights and Observations* (IDC #US52275425, April 2025)
- *IDC MaturityScape Benchmark: AI-Fueled Media and Entertainment Organization Worldwide, 2025* (IDC #US53283925, April 2025)
- *IDC MarketScape: Worldwide Connected TV Advertising Platforms 2025 Vendor Assessment* (IDC #US52039725, April 2025)

- *IDC's Worldwide Enterprise Infrastructure Tracker: Buyer and Cloud Deployment Taxonomy, 2025* (IDC #US53257425, March 2025)
- *IDC PlanScape: Industry Clouds* (IDC #US51722524, March 2025)
- *Worldwide Whole Cloud Forecast, 2025–2028* (IDC #US51736924, March 2025)
- *IDC FutureScape: Worldwide Media and Entertainment 2025 Predictions* (IDC #US51750324, October 2024)
- *Artificial Intelligence Impact on Media Business Cycle Flywheel* (IDC #US52520824, August 2024)

## Synopsis

This IDC study evaluates vendors offering "unified" integrated cloud solutions for media production, distribution, and monetization by 2025. It highlights the challenges media companies face, such as achieving profitability, rising content costs, technological shifts, and regulatory pressures. The study emphasizes the importance of leveraging cloud infrastructure, AI, and data insights to streamline operations, enhance viewer engagement, and develop sustainable monetization models. Vendors are assessed based on their capabilities and strategies to address these evolving industry needs. Emphasis is placed on prioritizing the integration of cloud-native solutions to streamline and unify production, distribution, and monetization processes, leveraging AI and automation to enhance operational efficiency and audience engagement.

"Prioritizing the integration of cloud-native solutions to streamline and unify production, distribution, and monetization processes, leveraging AI and automation to enhance operational efficiency and audience engagement is a necessity to compete effectively especially when targeting financial objectives that are challenging in today's streaming world," stated Alex Holtz, research director, Worldwide Media and Entertainment Digital Strategies. "Setting expectations partnering with consultants, systems integrators, and technology vendors that have validated experience and the financial knowledge to develop a business plan focused on total cost of ownership, breakeven, and profitability objectives from initial concept ideation through solution deployment including road map enhancements through the introduction of AI and data insights throughout the business cycle for intelligent decisioning is paramount to success."

## ABOUT IDC

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International Data Corporation (IDC) is the premier global provider of market intelligence, advisory services, and events for the information technology, telecommunications, and consumer technology markets. With more than 1,300 analysts worldwide, IDC offers global, regional, and local expertise on technology, IT benchmarking and sourcing, and industry opportunities and trends in over 110 countries. IDC's analysis and insight helps IT professionals, business executives, and the investment community to make fact-based technology decisions and to achieve their key business objectives. Founded in 1964, IDC is a wholly owned subsidiary of International Data Group (IDG, Inc.).

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