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GeoTracker™

Tracker research series | IAMT Business Intelligence Unit

June 2026

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Contents

Methodology

This report is based on a hybrid research approach, combining primary qualitative research, quantitative analysis, and secondary desk-based research to ensure robust and well-rounded insights.

Primary research

Primary research consisted of 12 expert interviews with C-suite and senior stakeholders, of which five were MediaTech buyers based in Europe, Asia-Pacific and Latin America as well as seven MediaTech vendors headquartered in North America, Asia-Pacific, the Middle East and Africa. These semi-structured interviews (30–60 minutes) were designed to capture in-depth perspectives on major region-specific business and technology trends, challenges and key drivers of MediaTech investment.

This was complemented by quantitative analysis from IAMT's MediaTech Industry Tracker, which is designed to provide valuable regional insights into media technology investment outlook and purchasing behavior, complementing and validating findings from the qualitative work.

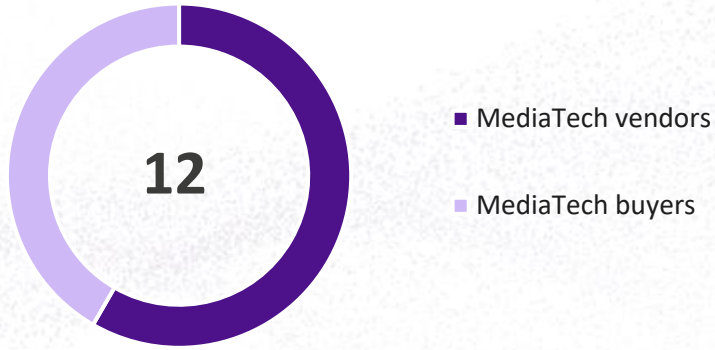
Secondary Research

In addition, secondary research (a desk study) was conducted using a mix of publications and information from different industry associations, market research providers, investment sources, technology magazines and company filings (sources are referenced throughout the report).

The research was conducted between February and May 2026 and examines the business environment and key technology trends in five different geographies: North America, Latin America, Europe, Asia-Pacific and the Middle East and Africa. The aim of this report is to inform MediaTech vendors and buyers' business decisions related to product development, go-to-market strategies, risk management and broader industry outlook.

Quotes may be shortened or combined for readability, without altering their original meaning. Ellipses (...) indicate where non-sequential statements have been combined or content has been omitted.

Expert interviews by profile



Introduction

Traditional media companies continue to move away from monolithic and siloed systems towards agile and modular software infrastructure, driving demand for less customized, best-of-breed solutions that enable better control over the technology stack and costs. In an increasingly fast-paced competitive landscape, media businesses are shifting their focus to direct return on investment (ROI), total cost of ownership (TCO) and the actual "time to value" of their investments. The rapid emergence of Agentic and Generative AI are accelerating the pace at which the windows of opportunities are opening – and closing – for media businesses, highlighting the need for agility and scale.

These macro trends are common for media businesses in all five geographies analyzed in this report. However, each studied region consists of a diverse mix of sub-regions characterized by local market dynamics, languages, demographics, regulations and challenges. Rising geopolitical tensions are more accentuated in the Middle East and Europe due to the on-going wars in Iran and Ukraine, but their spillover effects are impacting MediaTech buyers and vendors across the Americas and Asia-Pacific. Supply chain disruptions and rising concerns over AI and cloud sovereignty are making Europe and Asia-Pacific turn to local cloud service providers and internalize their technology value chains. The global shortage of memory chips is increasing costs of critical components like servers and basic memory, affecting lead times and margins. The aim of this report is to analyze major regional trends and challenges in five different geographies, helping IAMT Members and Media Partners to prepare and make business decisions based on data-driven insights.

> *"Time to value" is becoming a key factor in business transformation. Customers increasingly focus on when value will materialize, and our Value Flow methodology helps make that value explicit, measurable, and trusted. The challenge is that many organizations are still quite new to using structured metrics to measure value, so creating trust is absolutely critical for agility.*

Ben Vandenberghe
CEO, Skyline Communications

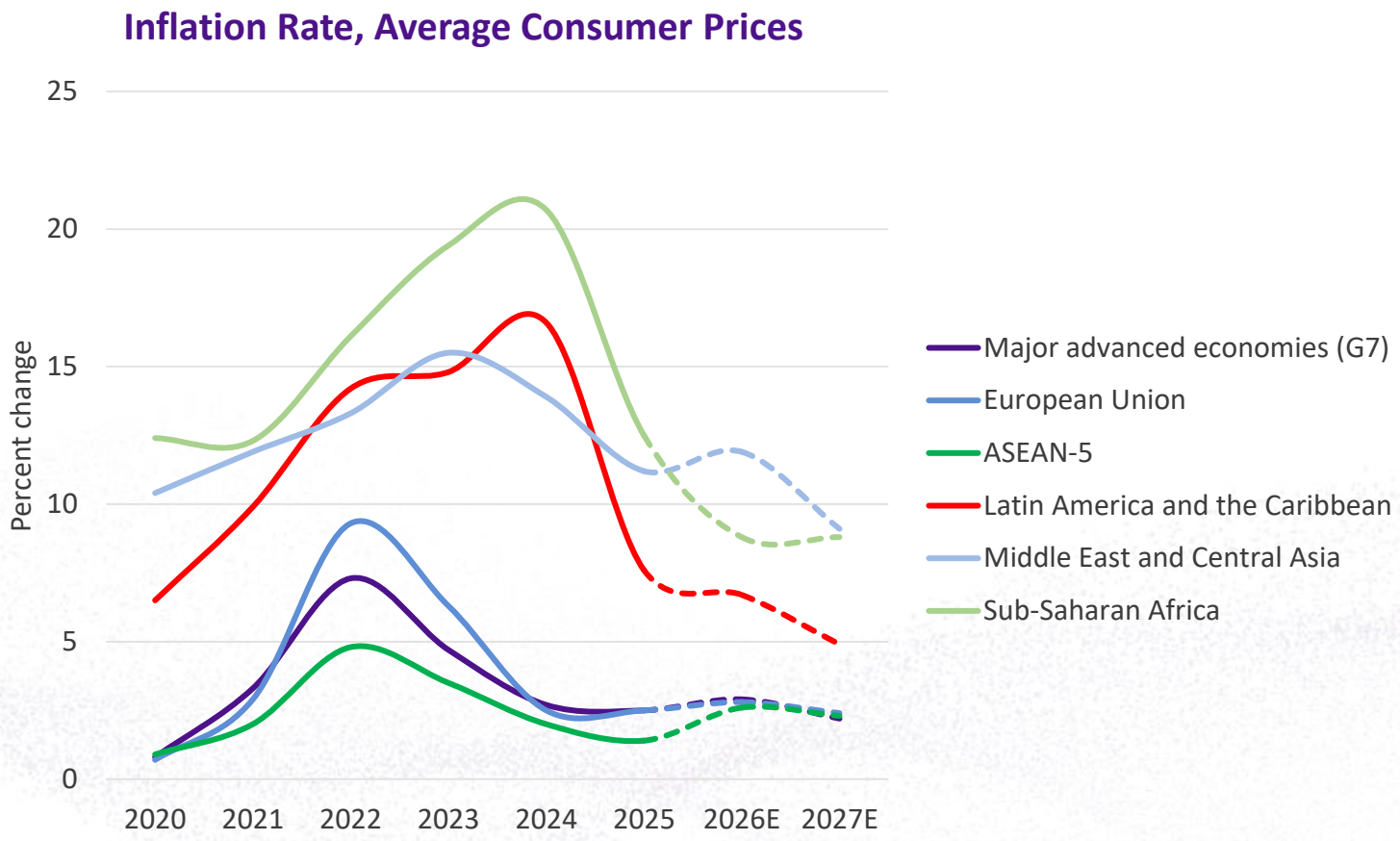
Source: IAMT

Snap Insights: Macro Trends

Global inflation has slowed down as expected, driven largely by easing energy and food prices, improved supply chains, and tighter monetary policy that cooled demand. After the sharp 2022 spike in inflation across advanced economies (notably the EU and G7), price growth has steadily normalized and settled around 2.5–3% by now.

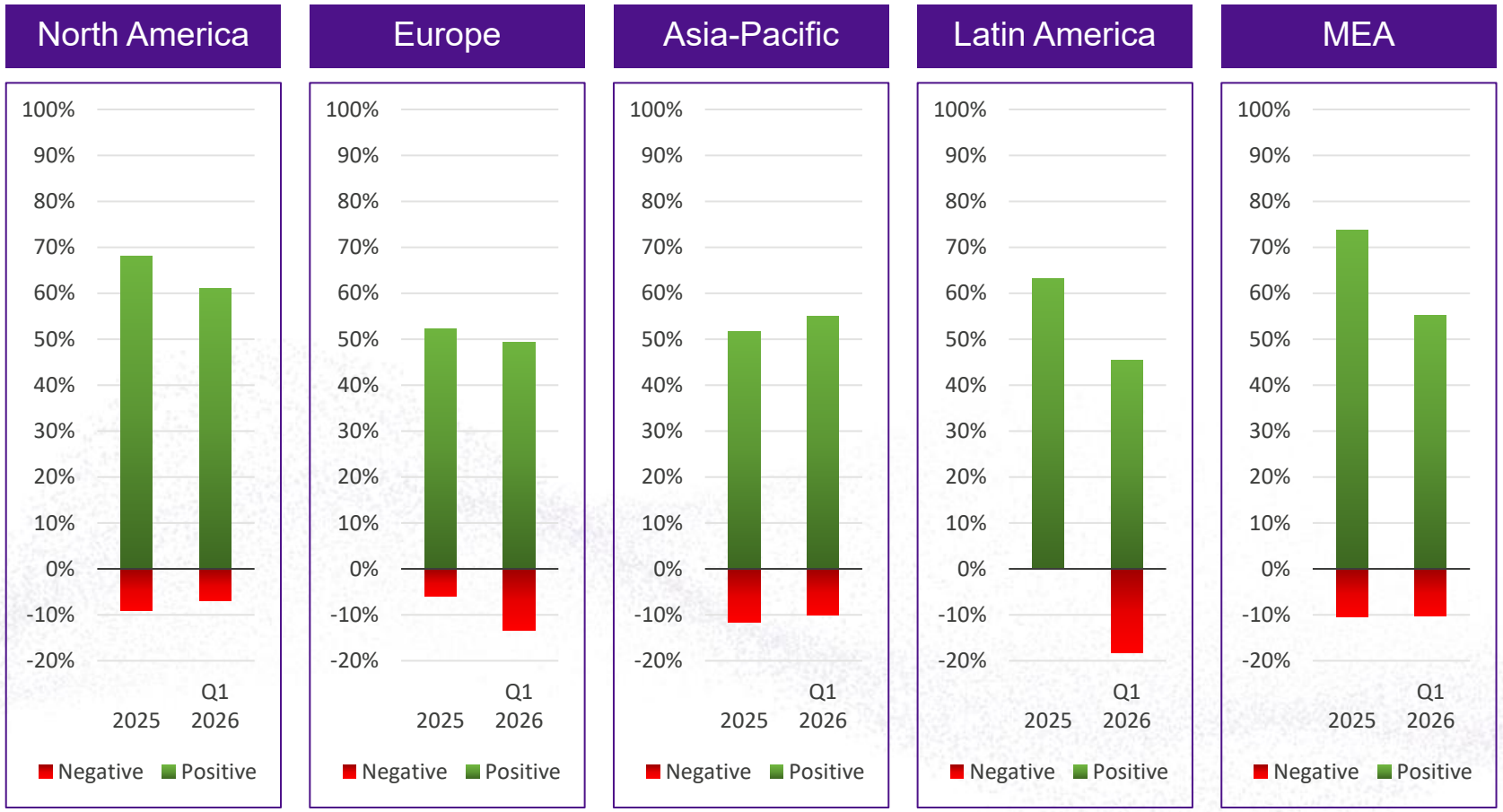
Emerging regions, however, peaked later and higher. Divergence remains today, with the Middle East & Central Asia staying elevated and showing an uptick in 2026 due to the war in the Middle East, which has an impact far beyond the region and is shaping the global economy.

Higher inflation in the Middle East, driven largely by energy-price shocks and conflict-related supply-chain disruption, is weighing on media technology investment and business confidence, with spillover effects across the global MediaTech sector. Elevated inflation and higher energy costs increase operating expenditures for data centers, cloud-based playout, and broadcast infrastructure, which are already capital-intensive for Middle East media groups and telco-owned broadcasters.



Sources: IAMT, IMF

Snap Insights: Business environment outlook



Geopolitical tensions in the Middle East, particularly the US-Israeli war with Iran, have severely worsened the business environment outlook for the Middle East and Africa (MEA) in early 2026. This escalation disrupts supply chains and business confidence.

Similarly, the business environment in Latin America has weakened in this period, marked by slower GDP growth projections and heightened macroeconomic pressures. Notably, the share of respondents who expressed a negative business environment outlook has risen from 0 in 2025 to 18% at the beginning of 2026.

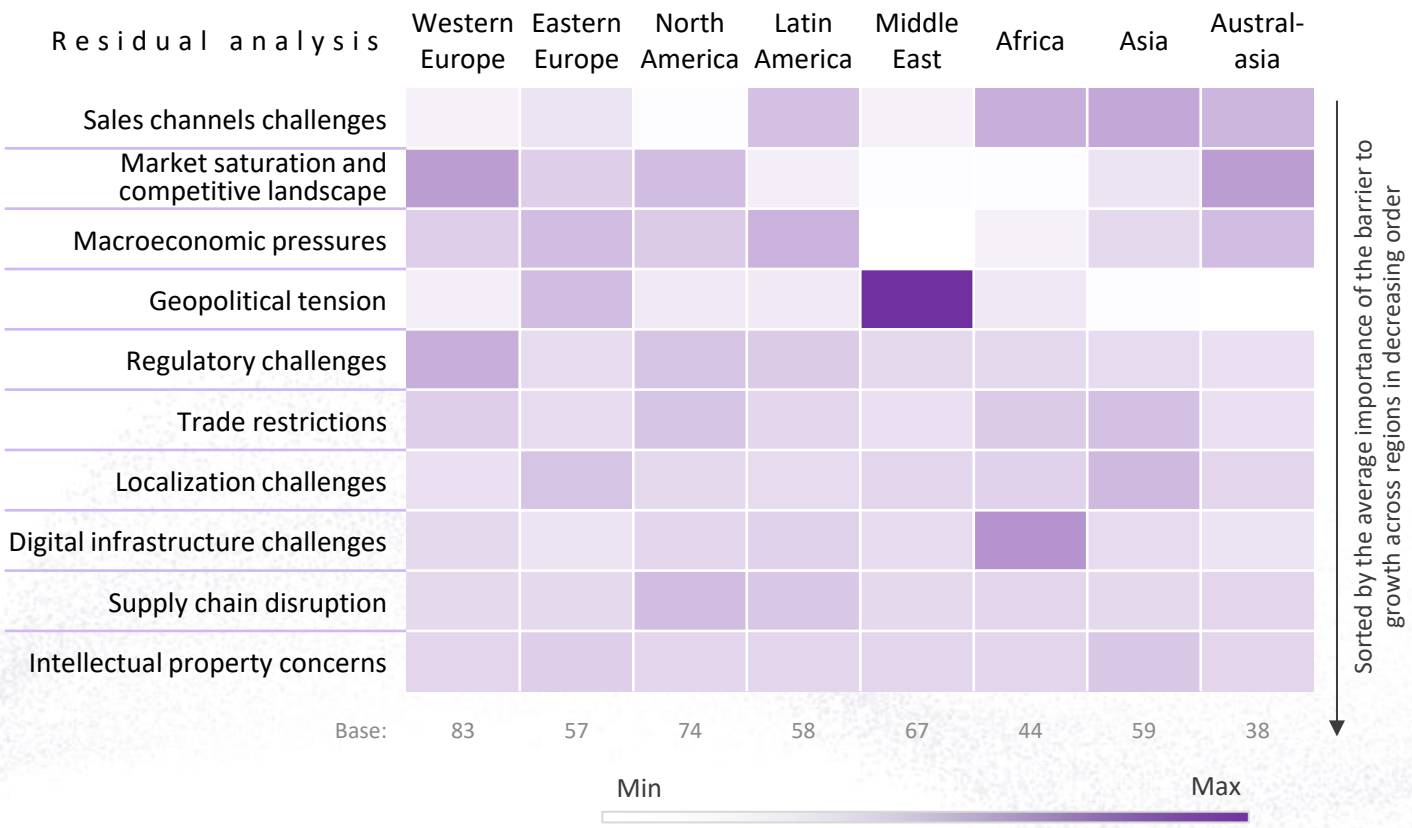
North America, Europe, and Asia-Pacific remained stable compared to the previous year.

Geopolitical tensions and macroeconomic constraints are hindering geographical expansion for media technology vendors worldwide in 2026.

Q. What is your organization's outlook for the overall business environment over the next year? (All industry)

Source: IAMT MediaTech Industry Tracker

Snap Insights: Regional Barriers to Growth



The heatmap is based on residuals (the difference between observed and predicted data values)

Q. What is the major regional barrier to the growth of your business in each of the regions where your company operates? (All industry, Q1 2026)

Sales channels challenges, market saturation and competitive landscape, macroeconomic pressures, and geopolitical tensions remained key barriers to growth across regions. In early 2026, escalating geopolitical tensions in the Middle East became a significantly greater barrier to growth than those in Eastern Europe in 2025 and 2024, as renewed conflict disrupted energy supplies, trade routes, and investor confidence across the region.

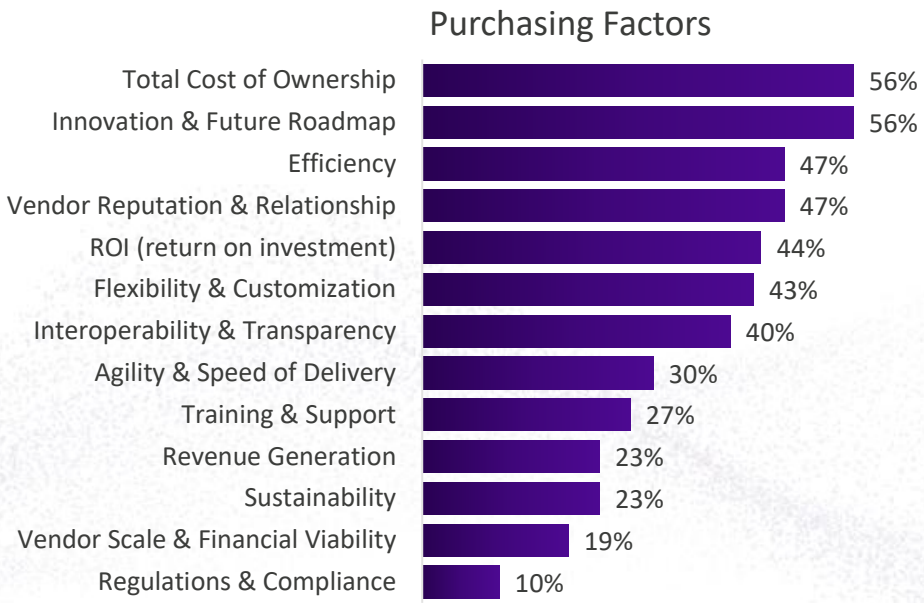
Market saturation and a tough competitive landscape are more pronounced in Western Europe and Australasia. Western Europe is also experiencing regulatory challenges such as the AI Act and the Cyber Resilience Act (CRA), which constrain growth for media technology vendors in the region.

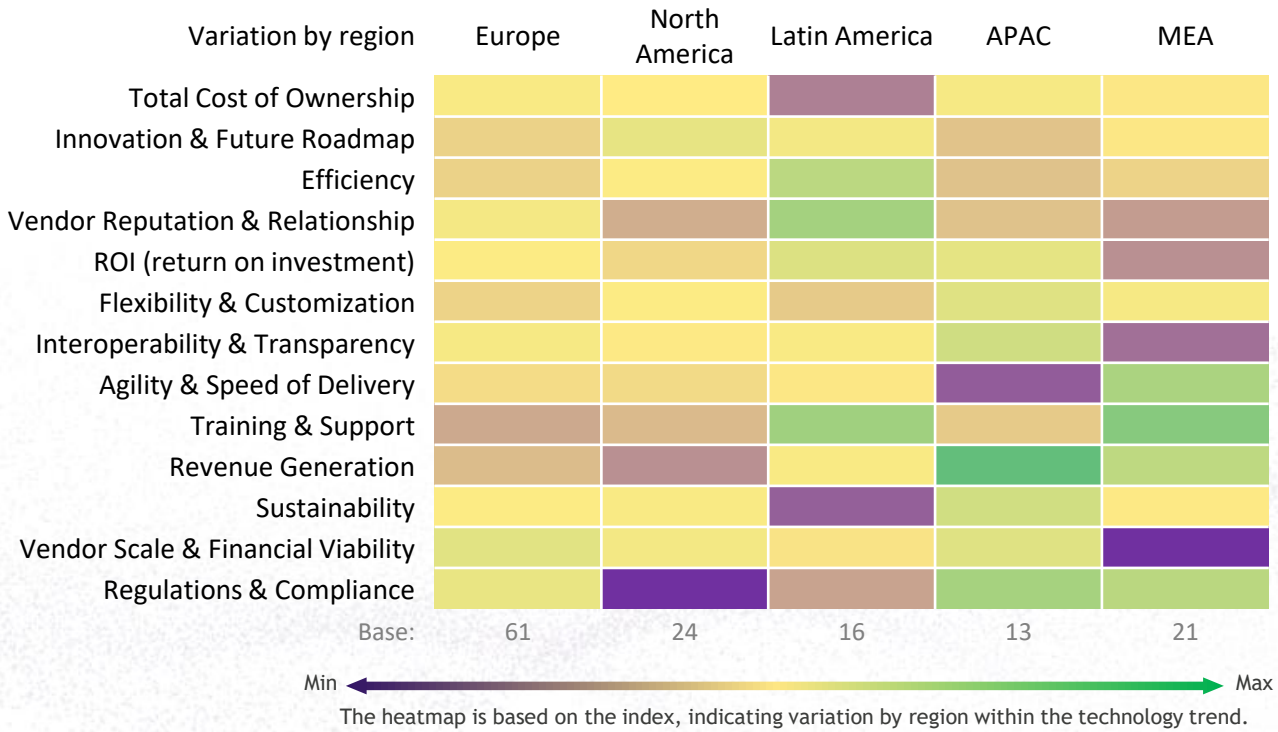
The AI Act imposes strict requirements on AI-based tools (e.g., content-recommendation engines, automated playout, or analytics), increasing compliance, testing, and documentation costs for vendors before they can deploy or sell products in the EU. The CRA, along with adjacent frameworks such as NIS2 and the Digital Operational Resilience Act (DORA), requires security-by-design, continuous vulnerability management, and incident reporting for software and hardware, increasing time-to-market and R&D overhead for MediaTech and broadcast-equipment suppliers. Digital infrastructure challenges continue to constrain growth in Africa.

Source: IAMT MediaTech Industry Tracker

Snap Insights: Regional Purchasing Factors

Media technology buyers base their purchasing decisions primarily on total cost of ownership and the technology's long-term potential. Priorities vary by region: buyers in Asia-Pacific place greater emphasis on revenue generation; companies headquartered in Latin America rely more on vendor relationships and post-sale support; and companies in the Middle East & Africa are more likely to prioritize agility, alongside training/support and revenue generation.





Q. In general, besides cost and technical specification, what are the most important factors that influence your decision to purchase media technology products and services? (MediaTech buyers, Q1 2026)

Source: IAMT MediaTech Industry Tracker

Snap Insights: North America – Key Takeaways

The Big Picture

Exemplified by the planned acquisition of Warner Bros. Discovery by Paramount Skydance expected to close in Q3 2026 depending on the legal review by the FCC, market consolidation continues as major media businesses seek scale and the ownership of IP rights of blockbuster characters to be re-monetized. MediaTech vendors told us that this is directly reducing the number of customers, even though the value of individual projects may slightly grow. Competition continues to increase, as major streaming services and social media platforms are absorbing a growing share of digital ad revenues and entering the ever-growing live sports market. Streamers and broadcasters are shifting their focus to growing live audiences on mobile and how to monetize vertical live video experience as well as create more immersive live experiences in stadiums and special venues (e.g. Las Vegas Sphere). This is driving investment in AI-based ad tech tools, attracting smaller advertisers and new revenue.

Technology Investment

Media companies – trying to do more with less or the same resources – are migrating from fixed hardware to software and particularly the cloud, which they are learning to use in a more cost-effective way, driving efficiencies and cost savings. Growing competition between public cloud service providers is improving their offerings to broadcasters significantly, enabling more cost-efficient use of hybrid and live cloud production. Live sports is driving investment in infrastructure that accelerates the delivery of live content securely across as many platforms as possible and at the same time provides ways that monetization can happen at a high level. Containerization is helping media businesses to connect old systems with new software-defined infrastructure. Investment in AI is growing dramatically, as media businesses experiment with new Agentic AI and Gen AI tools.

Challenges

Macroeconomic pressures and declining linear rev
enues are squeezing media businesses' budgets, forcing them to transform their technology infrastructure, business models, skillsets and management culture. While the "legacy debt" is slowing down the migration from fixed hardware to software-defined workflows, several MediaTech vendors told us that their US customers' biggest challenge typically relates to change management. The growing volumes of content combined with the increasingly competitive landscape is a challenge which media businesses are addressing by investing in agility, scalability and AI-led efficiency. This means leveraging more cloud as well as different cloud resource optimization (e.g. Kubernetes) and FinOps tools, helping media businesses to predict and manage cloud related costs.

Sources: IAMT

Snap Insights: Europe – Key Takeaways

The Big Picture

The fragmented European MediaTech market, characterized by a large number of public service broadcasters, commercial media companies and local production studios is under significant macroeconomic and financial pressures due to reduced government-funding, declining licensing fees and linear revenues. The competitive landscape is increasingly dominated by global streaming services and social media platforms. European media businesses are teaming up to improve cost-efficiency and audience reach through content bundling, co-productions and joint initiatives to stream content and split sports rights. The maturing adoption of IP and cloud are enabling remote and hybrid production, driven by demand for live sports. Rising geopolitical tensions are accelerating investment in distributed cloud and digital sovereignty, guided by the tightening EU regulations.

Technology Investment

Media businesses are moving from fixed hardware to software-defined workflows, favoring MediaTech vendors offering flexible solutions built on modular software infrastructure. This is bringing agility and adaptability to the rapidly evolving media ecosystem, now extending to ProAV and non-media market verticals. Promising technologies such as MXL and TAMS – originating from Europe – are gaining traction thanks to the industrywide collaboration supported by the EBU. AI remains the most important technology in European tech roadmaps, driven by the maturing adoption of AI in content production, content management and monetization. Live cloud production and cloud streaming at low latency are enabling more engaging experiences from all tiers of sports events. Demand for managed services continues to grow, as European broadcasters move to more complex all-IP and hybrid cloud environments.

Challenges

Increasing macroeconomic uncertainty, geopolitical tensions and the on-going war in Ukraine are decreasing government-funding for public service media while commercial broadcasters are challenged by declining linear ad revenue. Competition with global streamers in a saturated market requires effective monetization of content on multiple platforms as well as improving the mobile experience, which is currently monopolized by social media platforms. Change management and business transformation are constrained by strong European labor unions and skills gaps, limiting restructuring in public media organizations. Recent changes in the European security infrastructure amid geopolitical tensions are making media companies more concerned about cloud security and sovereignty. This has an impact on MediaTech vendors in terms of how they implement solutions.

Source: IAMT

Snap Insights: Asia-Pacific – Key Takeaways

The Big Picture

Media businesses' budgets remain tight, but stable thanks to growing demand for live sports and local productions. Consolidation and cost pressures are making broadcasters more open to adopting new technologies such as remote production and IP networking. Broadcasters are launching FAST channels and streaming apps to diversify digital revenue sources from advertising to gaming and e-commerce. Personalized vertical video players and architecting engaging consumer journeys remain key in the social-media led streaming market. The APAC region remains the world's biggest production hub of semiconductors, memory chips and consumer electronics. Rising geopolitical tensions and tariffs are making local manufacturers invest in self-sufficiency of critical technology and to internalize their supply chains.

Technology Investment

Asia-Pacific consists of several major MediaTech markets such as China, Japan, India, Southeast Asia (SEA) and Australia/NZ, which vary significantly in terms of their maturity to adopt new technology. Government-funded broadcasters have bigger budgets than their commercial peers, and they are now starting to move to IP and software-based workflows to leverage more remote production. This is providing unique efficiency gains in the region given its vast geography and long distances between production hubs and various live events. Investment in new data center capacity is growing rapidly, driven by demand for AI inference. The region's significant manufacturing base is benefiting from the local end-to-end AI value chain, providing local tech companies affordable computing, intelligent tools, innovation capabilities and resilience.

Challenges

The war in Iran, rising geopolitical tensions and the US-China trade war are causing macroeconomic uncertainty, inflationary pressures and supply chain disruptions, impacting Asian hardware manufacturers. The global shortage of memory chips – caused by the global AI boom – is increasing lead times and the costs of servers, ProAV systems as well as broadcast-grade equipment like IP cameras, editing workstations and media processors, routers, gateways and network equipment. The rising cost of hardware-based media production and distribution – including satellite – is pushing local media businesses to test and adopt IP technologies and hybrid cloud. However, the lack of skillsets as well as limitations related to connectivity in several parts of the APAC region are slowing down progress and stagnating investment.

Snap Insights: Latin America – Key Takeaways

The Big Picture

The Latin American MediaTech market remains stable and the business confidence relatively high thanks to the strong position of free-to-air linear TV, growing demand for live sports as well as major national tech transformations such as Brazil's move to the next-generation TV 3.0 standard, allowing improved personalization, immersive experiences and targeted advertising. Major broadcasters – such as Globo in Brazil – are acting as first-movers in the adoption of new technologies like AI, IP, remote production, virtual production and the cloud. Competition in the streaming market is increasing as new entrants – including social media influencers – are buying sports rights and attracting younger audiences with engaging content. Partnerships with telecom operators enable broadcasters to reach mobile-only subscribers and bundle content cost-efficiently.

Technology Investment

Media businesses in the region are investing in IP technologies such as SMPTE ST 2110 and SRT, enabling flexible, remote workflows and virtual production. These are both growing in the region, driven by demand for more engaging live experiences. The move to TV 3.0 television standard in Brazil – strengthening linear broadcasters' direct access to viewers – is a major transformation in the region, acting as an important benchmark for other Latin American countries. Major broadcasters – preparing for the FIFA World Cup 2026 – are using AI to drive efficiencies in content production and content management to enhance metadata, enabling improved content discovery and automated generation of highlights, clips and interactive elements.

Challenges

Sales channels challenges and macroeconomic pressures caused by surging global energy prices are major barriers to growth in the region. Large broadcasters – still reaching significant linear audiences – have resources to respond to competition from global streamers and social media platforms, but smaller, specialized Pay-TV operators and media companies are challenged by the increasing sports rights costs and production costs. Latin American viewers with low incomes are reluctant to subscribe to a streaming or a Pay-TV service, unless it is very cheap or bundled through their telecom operator. Content piracy and the lack of coordinated legal frameworks to protect IP rights in the region are making broadcasters powerless to curb content theft.

Source: IAMT

Snap Insights: Middle East & Africa – Key Takeaways

The Big Picture

After a strong decade of growth and unprecedented pace of foreign direct investment (FDI) in the cloud and AI infrastructure in the Gulf countries – driven by national investment programs – the Middle East's economic prospects have been severely disrupted by the war in Iran and the direct military attacks to several countries in the region. While the war continues organizations in the Middle East expect to see a pull back from foreign investment due to risk and uncertainty. The majority of media businesses in the region are government-funded, and in the most developed markets like in the Gulf countries, broadcasters are well resourced with stable budgets to invest in premium sports rights, local originals and OTT technology. In Sub-Saharan Africa, the most important MediaTech buyers consist of national governments, who are investing in linear radio and the transition to digital television to increase their political influence and to build more robust channels for African voices and local content.

Technology Investment

The Middle Eastern market consists of several sub-markets – the Gulf countries, Levant, North Africa and Egypt – which all have their own market dynamics and purchasing behaviors driven by different language groups, financial resources and maturity levels to adopt emerging technologies. The Gulf governments are ambitiously investing in data centers and computing capacity to accommodate the inflow of hyperscalers' AI projects and their national AI initiatives – these are having a positive spillover effect on media companies' readiness to experiment with AI. Major broadcasters in the Gulf countries are investing in streaming platforms as well as IP- and software-defined workflows enabling more engaging viewer experiences in live and virtual environments. In Sub-Saharan Africa, DAB+ radio and the on-going Digital Switch Over (DSO) are driving investment in transmitters and linear hardware.

Challenges

Outages caused by recent drone attacks on AWS' data centers in the Gulf countries revealed vulnerabilities in the physical security of critical digital infrastructure in the Middle East, highlighting the importance of a resilient backup infrastructure and the reliability of linear broadcast networks, as the Gulf countries advance in their national digitalization strategies. Research feedback indicates that despite their unique financial resources, broadcasters in the Gulf countries have conservative mindsets and lack information about the benefits of IP and cloud-based workflows, slowing down their adoption. Broadcasters' fixed budgeting cycles make investments in SaaS-based solutions through an OpEx model challenging and slow. In Sub-Saharan Africa, the lack of electricity and connectivity as well as low budgets to maintain upgraded networks, carry out software updates or buy spare parts remain major bottlenecks for growth.

Source: IAMT

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“Data centers are growing, not just AWS and Google. Public cloud services are maturing quite a bit due to the emergence of AI, but also private cloud. It's like a household term now.”

MediaTech Supplier
North America

North America

Regional MediaTech Trends

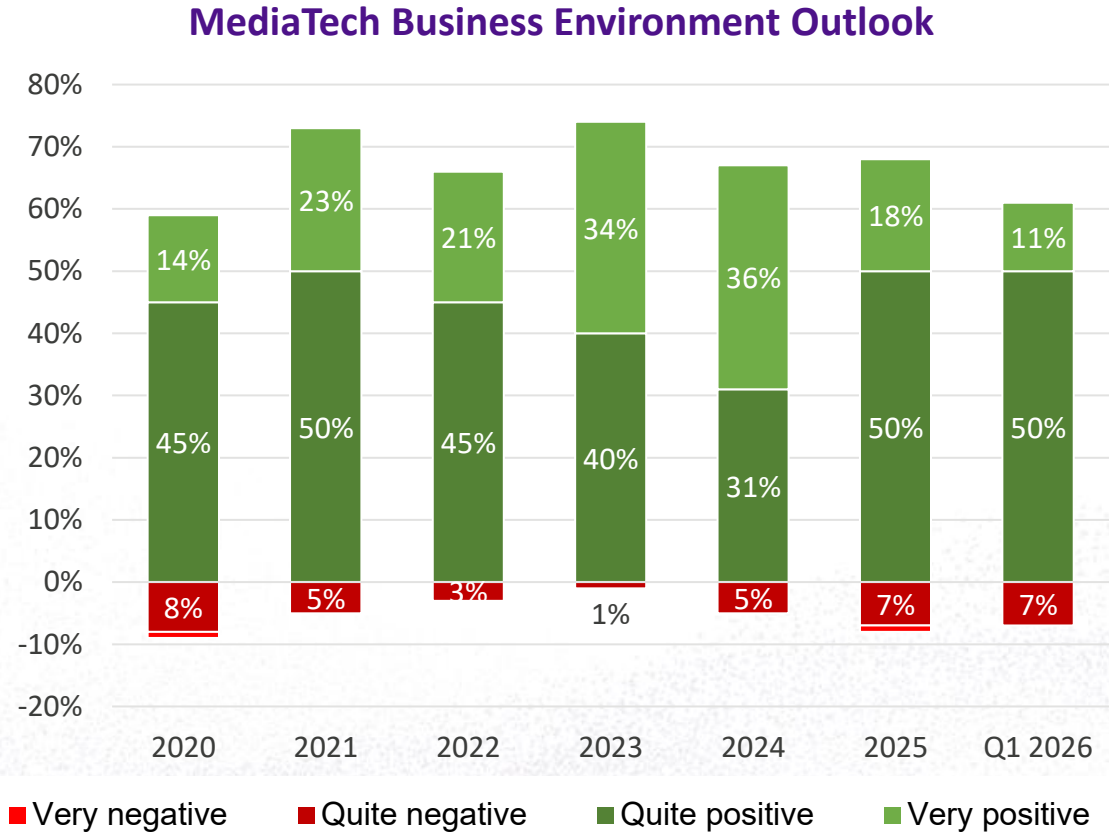
theiamt.org/biu

North America – Business Environment

Audience fragmentation created an unsustainable cost structure, reducing tech spend

The business environment outlook in North America deteriorated in the first quarter of 2026 due to the war in Iran, which has led to a peak in global energy prices, major supply chain disruptions, and oil-driven inflationary pressures in the US, causing macroeconomic uncertainty. While traditional media companies' budgets continue to shrink due to declining advertising revenues, major US streaming services are experiencing a surge in profitability thanks to their strategic shift from new subscriber acquisition to a focus on retention and profitability programs, including price increases and the launch of ad-supported tiers. This indicates that advertising has become a crucial revenue stream in the streaming space, driving investment in advertising technology across media businesses.

Broadcasters – going through consolidation, cutting jobs and costs – are prioritizing cost-efficiency, return on investment (ROI) and the "time to value" of new projects, wanting to know exactly when their investment will materialize. This is leading to more strategic use of cloud resources. Many broadcasters are moving into smaller facilities as the cloud and software-defined infrastructure are enabling them to cover more live events remotely and produce matches from home using live cloud production. However, "legacy debt" – a significant amount of fixed hardware – and the very high operational costs from running multiple platforms make comprehensive replacements of old systems impossible, resulting in financial prudence and a disciplined approach to technology spending.



Q. What is your organization's outlook for the overall business environment over the next year? (All industry, North America)

Source: IAMT MediaTech Industry Tracker

North America – Business Environment

Consolidation, competition, and consumer-grade tech are causing vendor price pressure

Major streaming services and social media platforms are dominating the competitive landscape, accelerating consolidation in the region as traditional media companies must seek scale, agility and the ownership of IP rights of blockbuster content. For MediaTech vendors, this means a decreasing number of media customers in the market. For example, one MediaTech vendor noted that the recently announced acquisition of Warner Bros. Discovery by Paramount Skydance directly made seven of their former individual customers shrink into one. Even though the value of individual projects may be higher after the restructuring, it does not compensate for the losses causes by the declining number of broadcast customers in the market. Shrinking budgets and the urgency to cover more live events and produce platform-specific content for multiple platforms are making media businesses adopt more consumer-grade technology in production such as smartphones, which now provide very high video quality at lower price points. This is causing significant price pressure for MediaTech vendors.

Market saturation is pushing broadcasters to form partnerships and pursue bundling strategies with telecom operators, social media platforms and other streaming services to maximize audience reach and to tap new revenue opportunities. In the maturing streaming market, new subscriber growth has become very difficult, shifting major streamers' focus to margin-led growth and subscriber retention through significant investments in live sports, engagement and high-quality originals. Rising media rights costs are forcing broadcasters to increasingly focus on lower leagues and niche sports.

As highlighted by IAMT's Creator Economy Collaboration Megatrend report, declining trust in traditional media is leading to increased collaboration between broadcasters and content creators. By partnering, broadcasters and other media companies strengthen audience engagement and achieve cost efficiencies by producing high-quality content with fewer resources amid tightening budgets. However, the monetization of these collaborations remains challenging. For example, one MediaTech buyer stated that while they must produce content for all major social media platforms, communication and collaboration with them is difficult and lacks transparency. For example, many social media platforms do not provide easy-to-use APIs for broadcasters and the APIs as well as their features change frequently without notice. It is also challenging to contact social media platforms like TikTok as their partner communication is increasingly run through chatbots and agents.

While IAMT data shows that geopolitical tensions have eased in North America in 2026 compared to 2025, unpredictable trade policies and geopolitical uncertainty are translating into macroeconomic pressures, protectionism and internalization of supply chains in the US as well as in other regions. Geopolitics is directing AI and cloud investments to countries with common political interests amid concerns over digital sovereignty and security.

Source: IAMT MediaTech Industry Tracker

North America – Business Environment

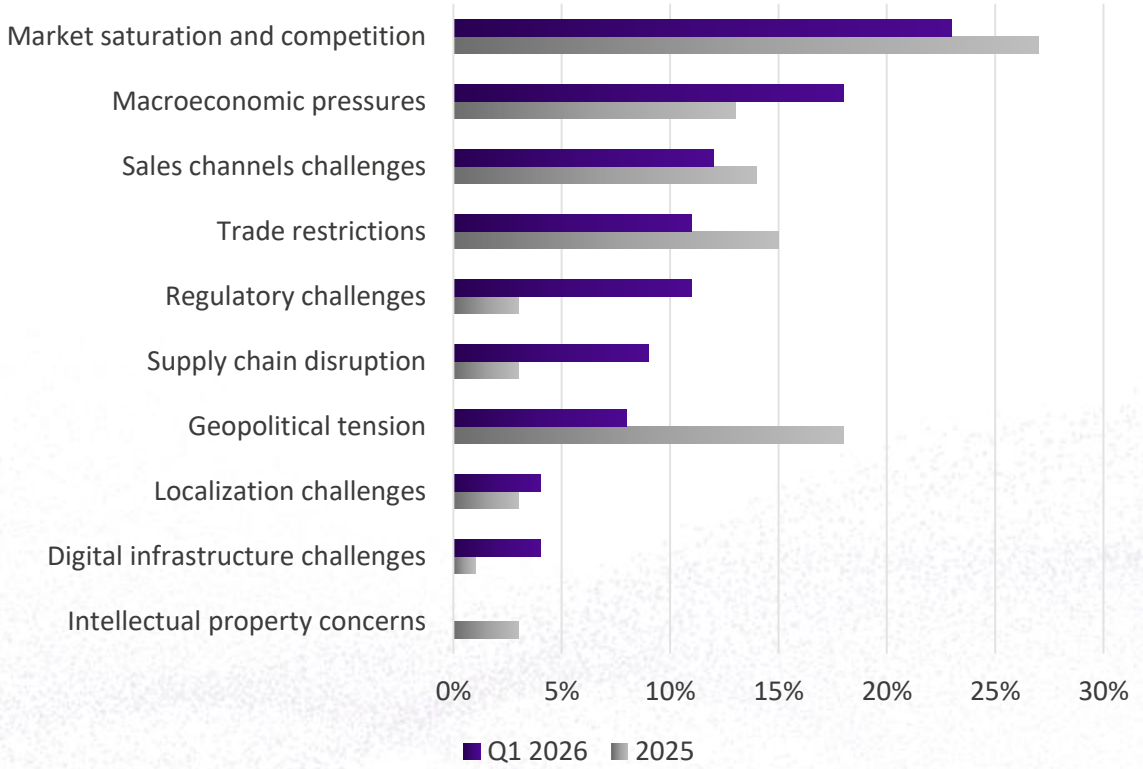
Regulatory challenges and supply chain disruption is hindering growth in the region

Regulatory burdens and supply-chain disruption are constraining growth in North America: tighter accessibility, rights-management, and spectrum rules add deployment complexity, while component shortages extend lead times and raise costs.

Accessibility and spectrum regulation have tightened in the US and Canada. Canada's Digital Technologies Accessibility Regulations (Dec 2025) will take effect in 2027–2028, extending WCAG 2.1 Level AA/ICT accessibility to websites, apps, and digital documents and adding procurement and training obligations—raising the bar for OTT platforms and content portals. In the US, the DOJ's April 2024 ADA-aligned Title II web-accessibility rule is being implemented, with deadlines extended to 2027–2028. Canada's ISED Spectrum Outlook 2023–2027 introduces new licensing approaches, stricter "use it or lose it" requirements, and expanded license-exempt bands (e.g. 6 GHz for Wi Fi). Reallocations and auctions in both countries are affecting broadcast-adjacent bands (e.g. C-band and 5G-adjacent bands), forcing redesign and requalification of RF (Radio Frequency), transport, and contribution equipment.

Supply chain disruption is compounded by a global memory shortage, constraining camera media, on-set storage, and post-production equipment. Demand by major AI firms and hyperscalers' data centers is absorbing chip capacity, creating shortages in the mature nodes used by specialized media hardware, while rising component costs are pushing up prices for post-production workstations and editing systems. Tariff-induced cost pressures increase the cost of importing components and finished media products. Tier 2 supplier bottlenecks can also trigger sudden shortages of specialized materials.

Regional Barriers to Growth in North America



Q. What is the major regional barrier to the growth of your business in each of the regions where your company operates? (All industry, North America 2025 n=131, Q1 2026 n=74)

Source: IAMT MediaTech Industry Tracker

North America – Business Environment

US government investment is accelerating the AI race led by big tech firms

Major Semiconductor Investments following the US CHIPS Act

2024 - 2026

- **Intel** – Awarded $7.86bn to support a multi-state US expansion program forecasted to cost +$100bn.
- **TSMC** – Granted $6.6bn to reinforce its US semiconductor operations, part of an investment plan of up to $65bn.
- **Samsung** – Awarded $6.4bn to support its planned $45 bn manufacturing initiative in the US.
- **Micron** – Granted ~$6.12bn to support its $125bn US investment plans.
- **Broadcom** – Broadcom positions itself to secure CHIPS Act funding: however, its award status remains unconfirmed.
- **NVIDIA** – NVIDIA announces plans to establish US production for selected chips, supported by up to $500bn in investment over the next four years.

Major AI-led investments following the AI Action Plan

2025 - 2026

- **Microsoft** – Microsoft allocates over half of its 2025 $80bn capital infrastructure budget to US data center expansion.
- **Google** – Google adds $10 bn to its 2025 cloud infrastructure spending budget, totaling $85bn.
- **Meta** – Meta outlines forecast budgets of $600bn from 2025-2028 for US data centers and AI infrastructure.
- **aws** – Amazon announces $50bn cloud & AI data center infrastructure investment for the US Government.
- **xAI** – Elon Musk's xAI and SpaceX merge into $1.25 trillion giant in February 2026 with plans to invest in next-gen AI infrastructure, including data centers in space.

Sources: IAMT, Company Filings

North America – Technology Investment

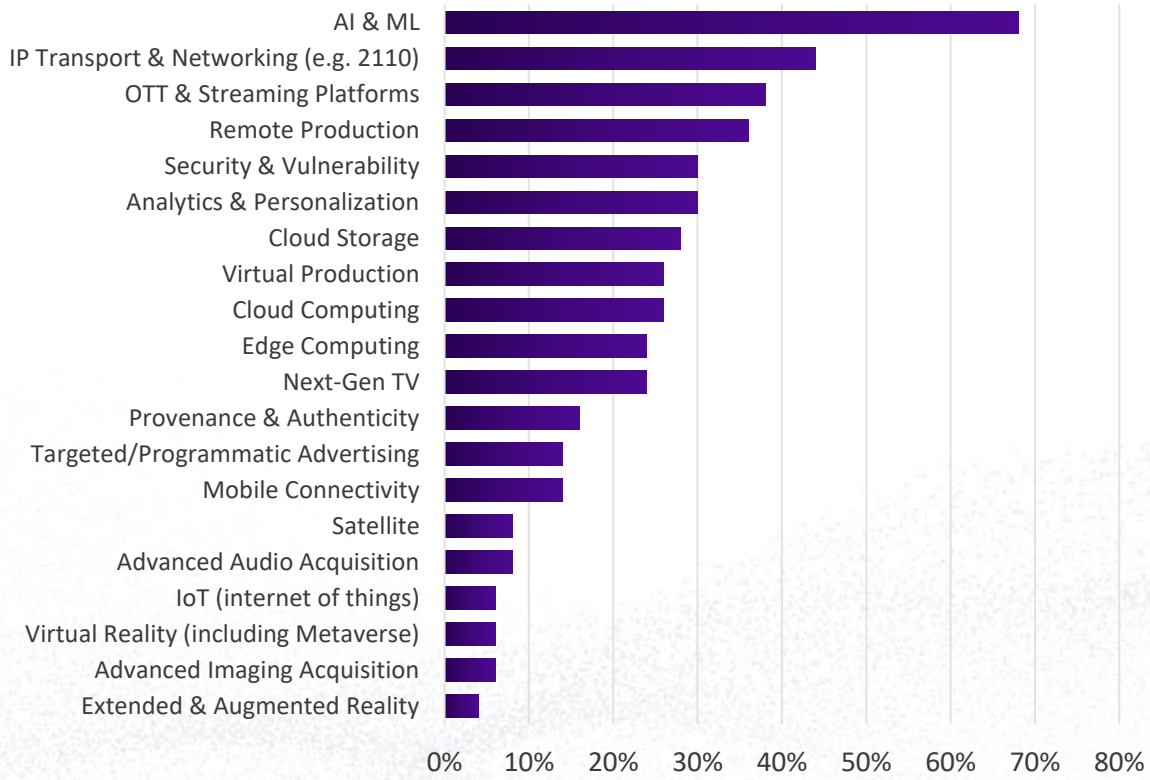
AI remains the most important tech trend, driven by the adoption of Agentic AI

The adoption of AI/ML is maturing as media businesses are starting to find the specific ways and fields in which AI can concretely save costs, augment production quality, improve monetization and security as well as provide insights to guide business strategies. AI-driven metadata tagging remains key in monetizing content on multiple platforms, enabling media businesses to automate content discovery, processing and versioning, which is dramatically reducing the content's time-to-market. AI-mediated discovery is disrupting traditional search engines.

The emergence of agentic AI systems designed for content production such as MoonValley's Marey are now supporting creative teams with ideation, storytelling and the simulation of movie characters' personalities, psychology and interaction with other characters. Agentic AI is also about to break through in integrating different APIs without coding, significantly improving and speeding up the shift from monolithic infrastructure to more modular and agile IT infrastructure.

Media businesses adopting Generative and Agentic AI tools are increasingly using "embedded creative technologists" who work within the production teams to redesign their work and reskill people. This emerging expert-led model to drive business transformation and the adoption of AI is increasingly used by major US broadcasters with vast content archives. By combining the embedded experts and AI tools, broadcasters' creative teams can rework and productize their decades-old archives of video, articles and images for a new generation of viewers, experiment with bold creative concepts and monetize them at speed on multiple platforms.

Trends in Tech Roadmaps - North America



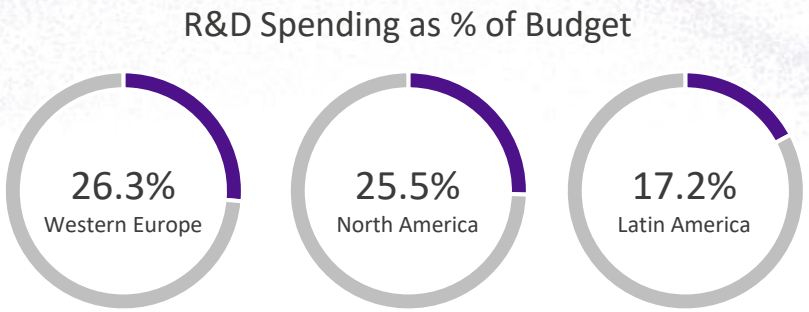
Q. What are the most important trends in your organization's technology roadmap? (All industry, North America, Q1 2026 n=50)

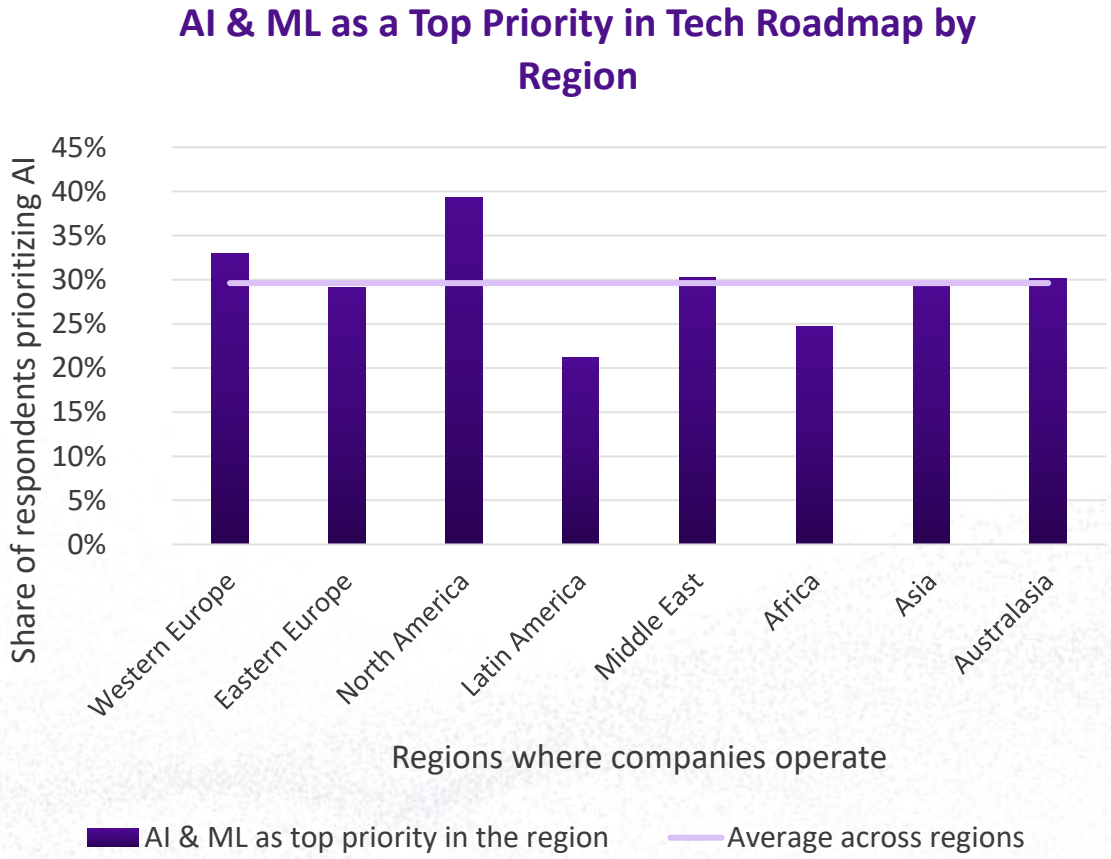
Sources: IAMT, newscaststudio.com

North America – Technology Investment

Companies in North America are focusing on AI, accelerated by declining computing costs

In early 2026, AI remained at the top of the industry's media technology roadmaps, with some variation across regions. Companies operating in North America place greater strategic importance on AI, with the gap most pronounced versus Latin America, where adoption and investment remain more uneven and generally lag behind the North American market. The gap between North America and Latin America can be partially explained by lower R&D spend, scarce computing resources and persistent skills shortages. IAMT data shows that regions with a greater share of R&D spending – Western Europe, North America, and Asia-Pacific – tend to put greater emphasis on AI & ML in their technology roadmaps. In North America, AI is framed as a core strategic differentiator rather than just an efficiency lever. Increasing competition between cloud services in the US is translating into lower computing costs and significantly more cost-efficient cloud offerings to broadcasters.





Q. Please select the most important trend in your organization's technology roadmap in each of the regions where your company operates. (All industry, Q1 2026, n=81 to 170)

Source: IAMT MediaTech Industry Tracker

North America – Technology Investment

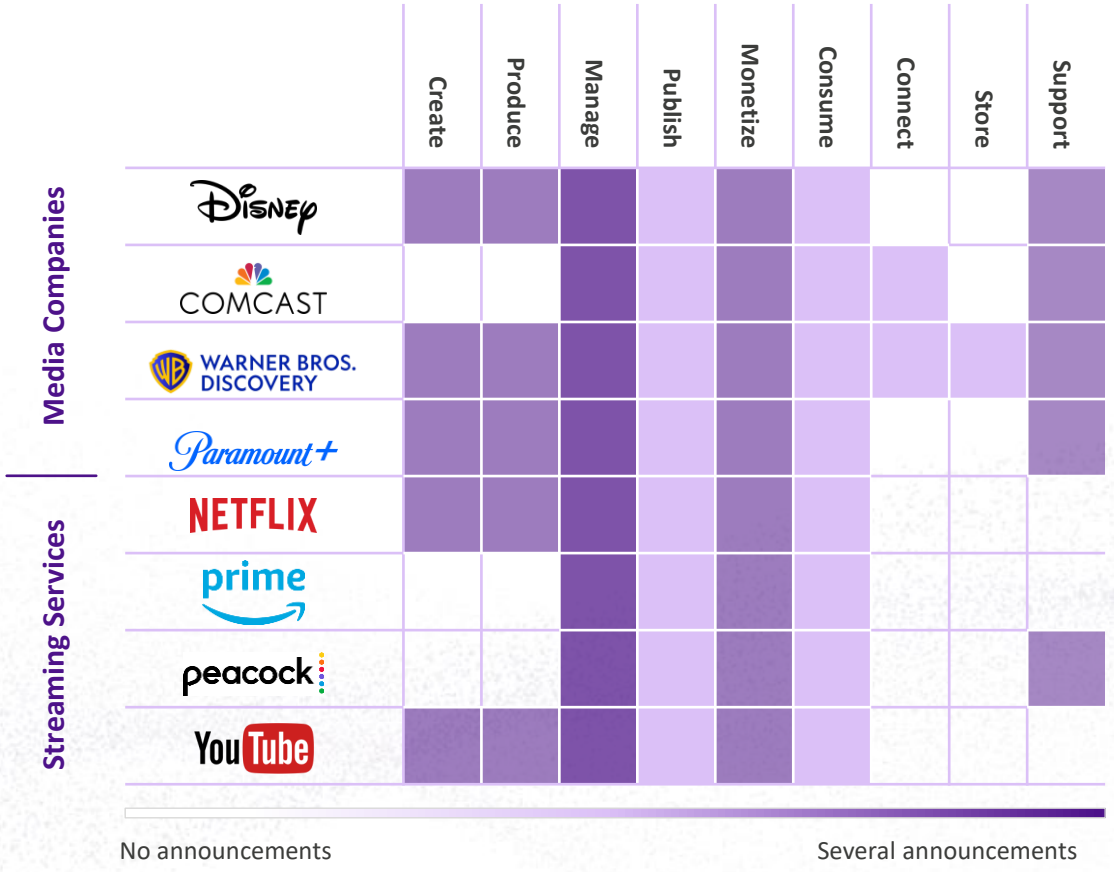
AI remains the key driver of investment in Manage, driven by growing data volumes

Media businesses are investing in AI-driven metadata analysis to improve efficiency and the total cost of ownership (TCO) through the reduction of labor-intensive processes and storage costs. Agentic AI applications are emerging rapidly to address media companies' "data problem" – virtual agents are increasingly processing and analyzing existing video archives as well as automatically generating metadata from incoming feeds, suggesting improvements in the workflows and supporting business decisions.

MediaTech vendors are moving from trials to commercialized solutions using Agentic AI. For example, in April 2026, Avid and Google Cloud announced a partnership to integrate Generative and Agentic AI into Avid Media Composer – a nonlinear editing system – and Avid Content Core – a cloud-native MAM platform – helping media businesses to manage large volumes of high-resolution media in hybrid environments. In the US, media businesses are asking for intelligent tools that plug easily into existing workflows and scale with their creativity, so an editor can collaborate with an AI agent to create assets "on the fly".

Agentic AI is also expected to change API consumption fundamentally by enabling natural language-driven autonomous API discovery. Some vendors are already testing Agentic AI to integrate different APIs without coding. This means that Agentic AI toolsets can speak to each other without needing developers to do the coding to connect different APIs. The introduction of prompt-based services for API management would aid in the democratization of media management systems allowing them to be used by less specialized operators. For example, Grass Valley's new AMPP Assist is an AI agent inside the suite, helping teams to analyze configuration issues.

Announced AI initiatives by content chain



Sources: IAMT, Company Filings

North America – Technology Investment

Live sports is driving investment in remote and hybrid production as well as private 5G

Major streaming services are increasing their coverage of live sports, pushing up the prices paid to win media rights for top tier sports. Broadcasters are responding to fierce competition by splitting sports rights with other broadcasters and focusing more on lower tier and niche sports, leveraging hybrid and live cloud production. Major streamers like Amazon Prime, DAZN and YouTube – combined accounting for over 60% global spend on sports rights by streamers – are focusing on AI-powered analytics and fan engagement as well as partnering with sports leagues and the creator economy to engage new audiences.

The growing demand for any kind of live sports is driving investment in multiple camera categories, including drones and professional PTZ cameras, to create more perspectives and unique feeds. Remote production has become a widely adopted technology enabling distributed operators to cover more live sports events and connect to a centralized IP-based backbone. Hybrid and live cloud production is enabling production teams in different geographies and time zones to efficiently produce more games remotely from home – saving travel costs, carbon emissions and improving productivity.

Cloud-native media asset management platforms using AI are revolutionizing the generation of highlights packages and real-time analytics – including biomechanics analysis through RFID chips attached to players on the field – as well as data-driven training optimization for sports clubs. AI-powered analytics are also enabling hyper-personalized fan experiences on multiple devices and improving monetization opportunities through dynamic content recommendations and contextual ad targeting.

Sports venues are increasingly used to create multi-modal live experiences which attract new audiences on social media platforms. For example, the Super Bowl half time performances featuring popular singers as well as brand-influencer collaborations happening "behind the scenes" at the stadium are driving viewership before, during and after the “game day”. Media businesses are increasingly using virtual production studios, augmented reality (AR), virtual reality (VR), interactive fantasy apps as well as influencer streams.

The trials of private 5G networks in live sports are advancing rapidly in the US, as broadcasters – preparing for the up-coming FIFA World Cup 2026 in the US, Canada and Mexico – are facing the challenge of managing dozens of camera feeds, while struggling with location-based connectivity, with the risk of missing critical moments in the game. For example, Verizon Business – the official telecommunications partner for the FIFA World Cup 2026 – provided critical “game day” connectivity through a private 5G network for the Super Bowl and all NFL venues in 2025-2026, enabling intelligent video prioritization for live production by using Nvidia Enterprise AI and Holoscan for Media platforms to manage all the camera feeds.

Sources: IAMT, Ampere Sports – Media Rights

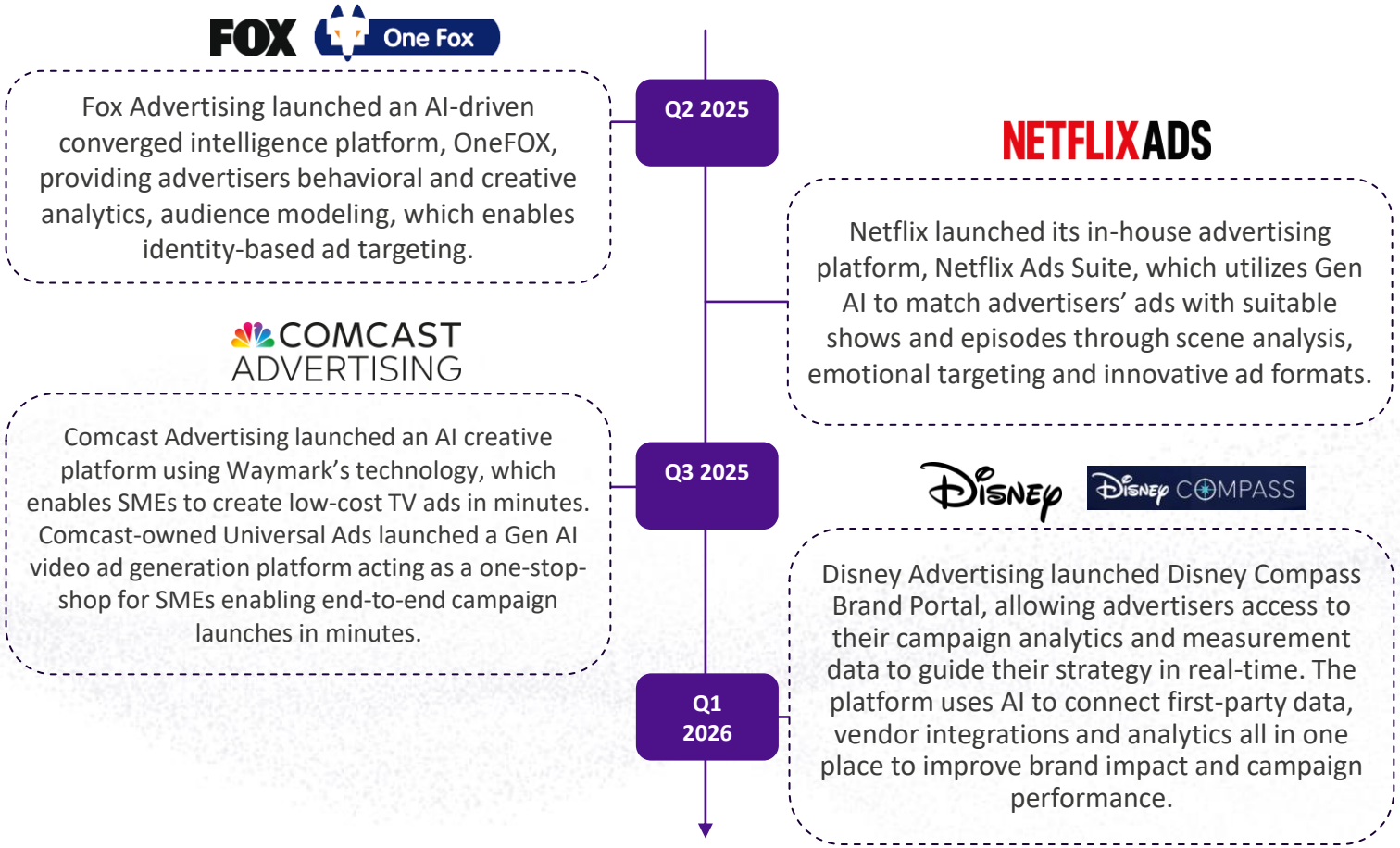
North America – Technology Investment

Investment in Gen AI ad tech platforms is growing, automating ad generation

Major media businesses in the US are launching their own in-house developed ad technology platforms, which utilize different AI tools and functionalities, making advertising during primetime and premium events more accessible and affordable for small and medium-sized advertisers. The maturation of ad-supported streaming and freemium business models means that media businesses need to develop, acquire ad tech capabilities or outsource advertising operations to managed service providers to make their ad-based streaming model profitable.

According to the Interactive Advertising Bureau (IAB) data, Generative AI has emerged as a major tool to create video ads, with 86% of ad buyers already using or planning to use Gen AI-generated ads. Computer vision technologies – enabling media businesses to improve contextual awareness in targeted advertising and integrate e-commerce with streaming – are becoming critical in attracting new advertisers. For example, in Q4 2025, Netflix reported record quarterly ad sales following the launch of its Gen AI-driven Netflix Ad Suite platform in the US earlier in the year, reflecting the increasingly important role of advertising revenue streams for streaming platforms.

Major AI-based ad tech platforms launches by US media businesses



Sources: IAMT, IAB, Company Filings

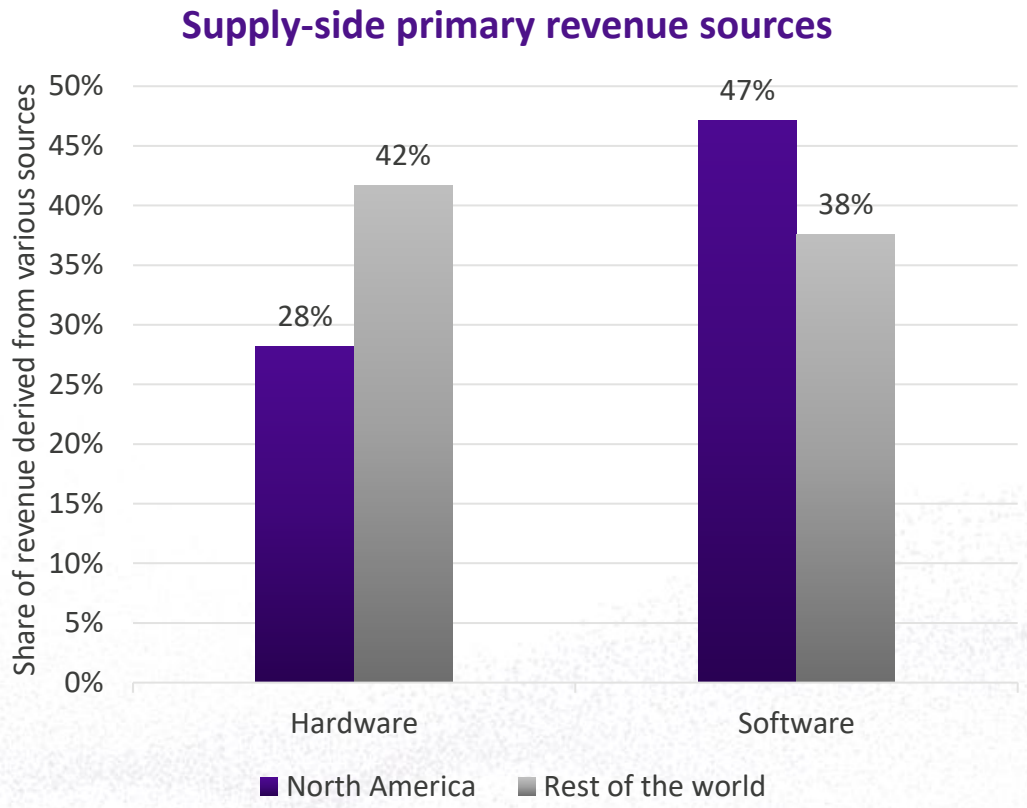
North America – Business Models

Improving interoperability and integrations are diversifying cloud workflows

IAMT data shows that North American MediaTech vendors are accruing a greater share of their primary revenue from software compared to the rest of the world. In the US, increasing competition between cloud service providers thanks to new market entrants (e.g. Oracle) is dramatically improving the quality and cost efficiency of cloud services offered to broadcasters. This is accelerating the migration from fixed hardware to software and especially the cloud, providing broadcasters with scalability and flexibility. Despite the existing "legacy debt" slowing down the migration from monolithic systems to more agile, modular software infrastructure, media businesses in the US are increasingly using technologies such as serverless computing and containerization, helping them to connect old systems with new software-defined workflows faster.

North American end users are also showing strong interest in shared memory compute workflows such as MXL (Media eXchange Layer), which aims to solve the challenge of transferring uncompressed content between two processes efficiently by either sharing the same node or doing it over a network. In the US, MXL is supported by many MediaTech buyers and vendors, including CBC/Radio-Canada, Grass Valley, AWS and Nvidia. The promise of MXL for broadcasters is is that they will be able to better avoid vendor lock-in on generic servers where processing apps of different MediaTech vendors run side by side and exchange data through a "shared memory layer" to eliminate latency issues.

The move from fixed hardware to the software world is driving investment in managed services which are filling skill gaps in broadcasters' IT. The proliferation of managed service offerings is bringing in-depth IP networking, cloud, orchestration and containerization expertise to broadcast organizations, helping them to deliver faster and manage security risks.



Q. Could you roughly estimate the share (%) of your organization's revenues that come from software sales, hardware products, and other revenue sources such as customer support, training, and maintenance? (MediaTech vendors, Q1 2026, North America n=36, rest of the world n=46)

Source: IAMT

iamt

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Time to market and speed to publish are the most important investment drivers. Being able to acquire content from anywhere and publish it to our outlets is a huge factor in what we invest in.

Peter Zanchetta
CTO, TV2Nord
Europe

Europe

Regional MediaTech Trends

theiamt.org/biu

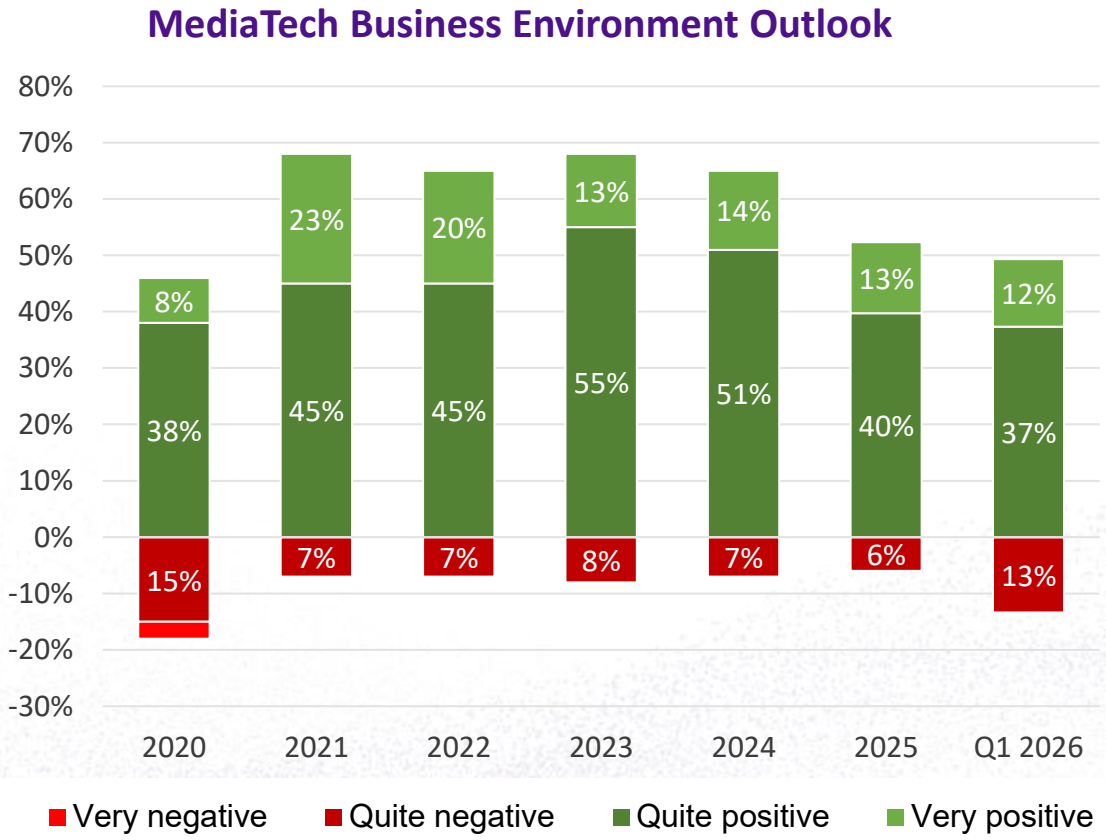
Europe – Business Environment

Broadcasters are shifting from CapEx to more flexible OpEx

Europe is a highly fragmented market characterized by numerous language groups, public service broadcasters, private media companies and local production studios. Broadcasters are responding to intensified competition from major global streamers by growing their collective scale through consolidation, content aggregation and partnerships.

The fragmentation of audiences has led to an unsustainable cost structure, and the operational costs of producing content for multiple platforms are rising. At the same time, an extensive capacity of legacy hardware – which might still be early in its deployment lifecycle – is forcing broadcasters to stick to hybrid environments, making their technology spending more focused on measurable return on investment, reasonable payback times and the speed at which the projects can deliver measurable, commercial value. Hence, their focus is moving away from CapEx-based investments towards projects and solutions that reduce operational expenses, weakening demand for premium-priced infrastructure products and services.

At the same time, the move from monolithic systems towards more agile and modular infrastructure remains a long-term necessity, as the survival in the multi-platform streaming economy requires scale, adaptability and flexibility to be agile and “change direction” if needed. One MediaTech vendor stated that being able to change one’s mind has become a big feature among end-users. For instance, a broadcaster might buy a network processor for a particular function, but it can be easily reprogrammed in software to another use in few hours.



Q. What is your organization’s outlook for the overall business environment over the next year? (All industry, Europe)

Source: IAMT MediaTech Industry Tracker

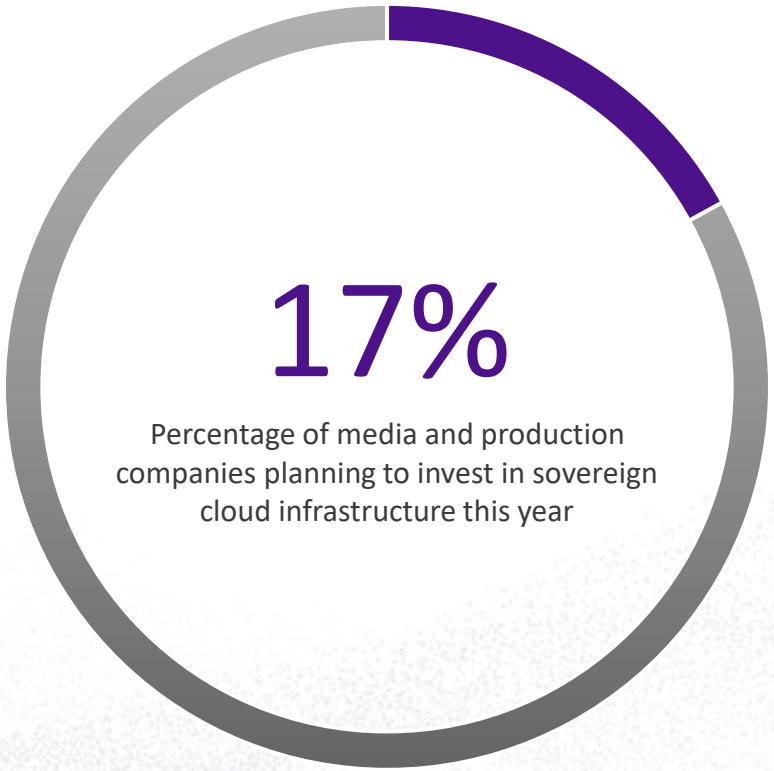
Europe – Business Environment

End users reallocate resources toward sovereignty and distributed cloud capabilities

The changing geopolitical landscape is leading European end-users to reevaluate their spend on cloud services, inducing the reallocation of resources based on new priorities. The shift toward more distributed cloud compute and cloud storage capabilities across multiple physical locations is accelerating due to the growing importance of digital sovereignty, sovereign AI, and edge deployments at scale. Edge computing allows the processing of data near its source, reducing bandwidth demands. European broadcasters are investing in distributed cloud, allowing them to retain physical control over their infrastructure, while they can still benefit from agile access to advanced AI and cloud services. Distributed cloud can consist of customer-owned data centers, regional facilities and edge environments.

The European Broadcasting Union (EBU) and the European Union (EU) have been actively promoting and developing mechanisms to improve cloud sovereignty in Europe. In April 2026, the European Commission (EC) announced that it had awarded €180mn for sovereign cloud to four European cloud service providers – Post Telecom, STACKIT, Scaleway and Proximus – as part of the EU's efforts to enhance Europe's own sovereignty and to reinforce strategic control across key technologies and infrastructure.

IAMT data shows that 17% of media companies in Europe are planning to invest in sovereign infrastructure already this calendar year, with a significant level of uncertainty – 28% of respondents answered "Don't know" to the question. This reflects that many media businesses are in a "waiting mode" with their cloud strategies amid rising geopolitical tensions and stricter EU regulations.



Q. Does your organization plan to invest in sovereign cloud infrastructure during this calendar year? (Media/production companies, Europe Q1 2026 n=18)

Sources: IAMT MediaTech Industry Tracker, European Commission

Europe – Business Environment

Geopolitical tensions, economic uncertainty, and regulation are impacting growth

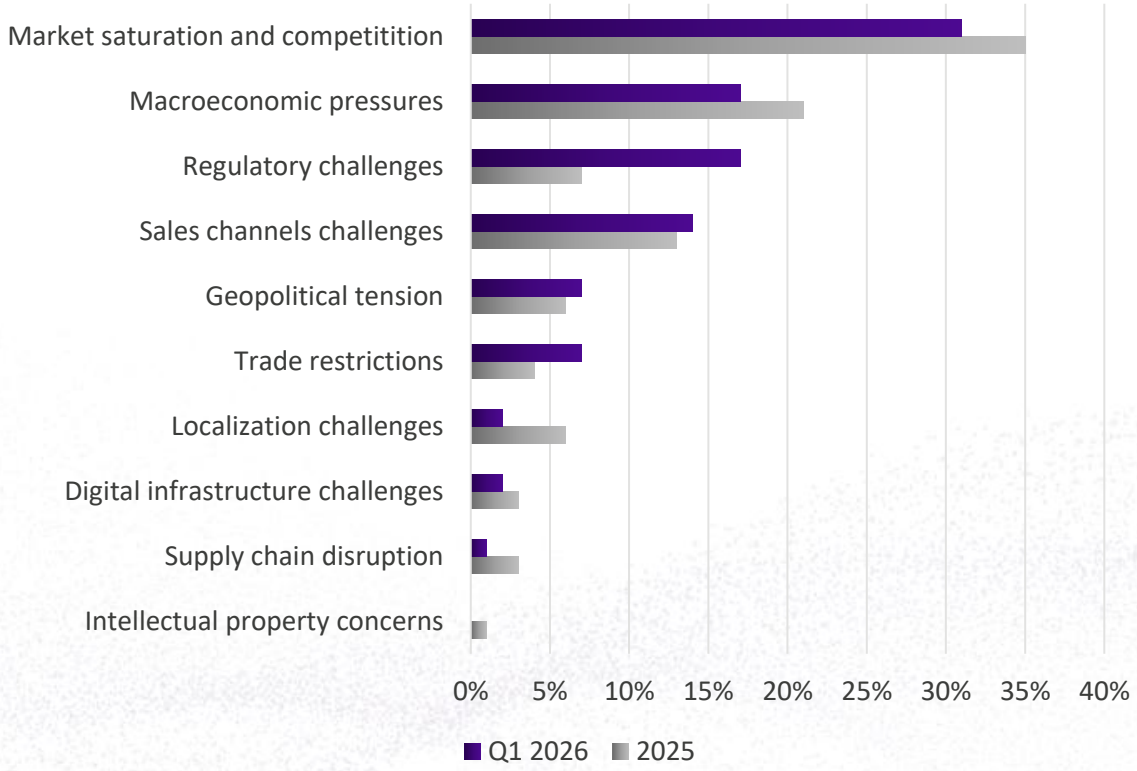
Surging energy prices, supply chain disruptions and the on-going transformation of European security infrastructure catalyzed by the wars in Ukraine and Iran are accelerating global macroeconomic pressures, negatively affecting media technology spending in the region. Declining linear revenues and government funding and the growing hegemony of social media and streaming services are squeezing European broadcasters' budgets.

Especially the public service media is concerned about sovereignty issues, threatening European institutions and democratic values. This is translating into a change in European broadcasters' cloud strategies, redirecting investment from hyperscaler ecosystems to European public and private clouds. Nevertheless, building up a European-only computing capacity will take time, which has caused some broadcasters to postpone their cloud projects and temporarily stay on-prem.

The emergence of Gen AI is challenging audience trust. Growing demand for sovereign AI is having a direct impact on how media businesses implement solutions and which vendors European broadcasters can select to collaborate with, reflecting an increasingly important role of trust in relationships between vendors and technology buyers.

Regulatory challenges are becoming more pronounced in Europe, partially explained by the EU's new restrictions for non-European cloud service providers and AI firms. The EU AI Act – introduced in 2024 – will move into its enforcement phase in 2026, and in the second quarter of the year, the EC is expected to introduce the Cloud and AI Development Act, protecting Europe's digital sovereignty.

Regional barriers to growth in Western Europe



Q. What is the major regional barrier to the growth of your business in each of the regions where your company operates? (All industry, Western Europe 2025 n=154, Q1 2026 n=83)

Source: IAMT MediaTech Industry Tracker

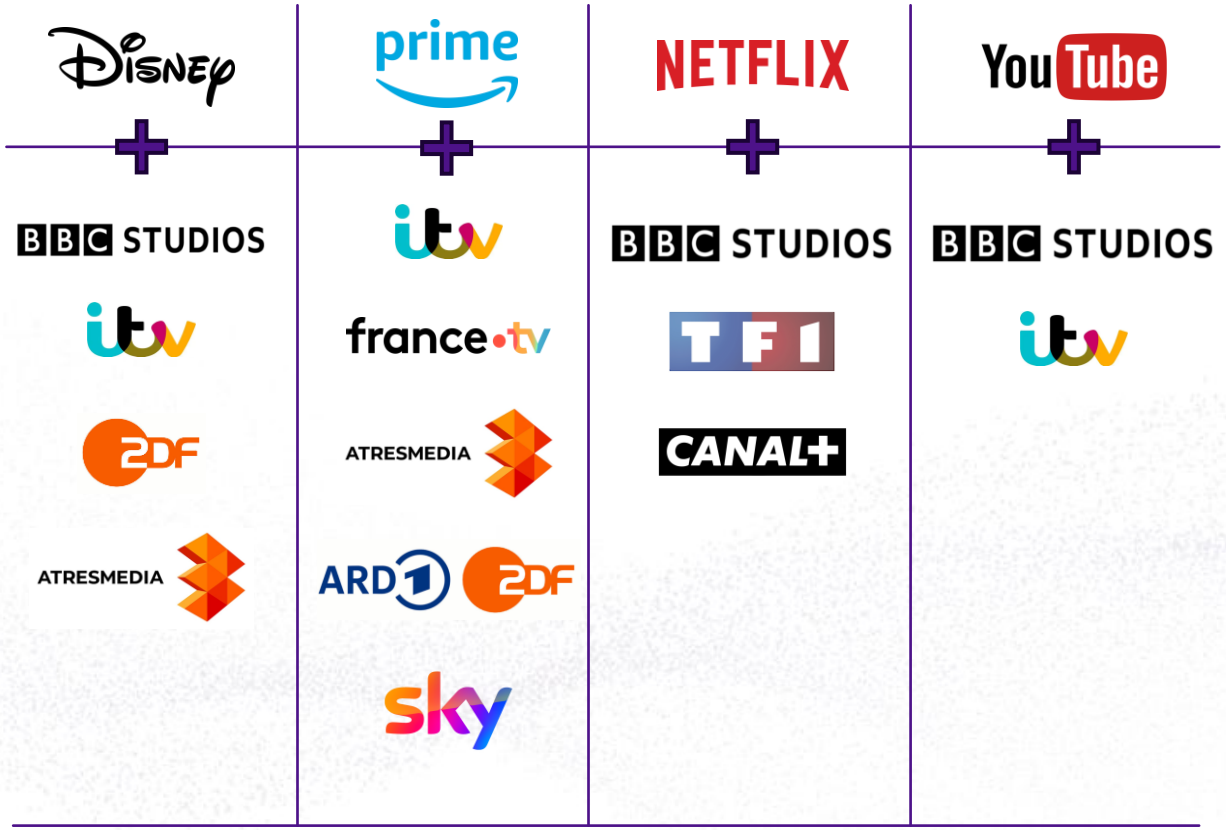
Europe – Business Environment

Consolidation and collaboration become key to reach new audiences at scale

While the move to over-the-top (OTT) streaming has lowered entry barriers for new players –making the European streaming space increasingly crowded – consolidation continues in the European market, as media companies try to streamline costs and find economies of scale. Increasing market concentration is evidenced by several mergers and acquisitions (M&A) announced in 2025. For example, RTL Group announced that it will acquire Sky Deutschland, while DPG Media acquired RTL Nederland and MediaForEurope (MFE) took over ProSiebenSat.1. Canal+ announced that it had expanded control over MultiChoice to strengthen its presence in the African market. In Q1 2026, Banijay Group and All3Media announced a merger, forming one of the world's largest independent television production groups.

The proliferation of new partnerships between streaming services and European broadcasters continued in 2025 with Netflix announcing strategic partnerships with BBC Studios, TF1 Groupe and Canal+, while Disney+ entered content partnerships with BBC Studios, ZDF Studios, ITVX and Altresmedia. Amazon Prime Video announced collaborations and co-productions with ITVX, France Televisions and RTL Group. Traditional broadcasters and production studios like ITV, Channel 4, Banijay and BBC Studios all secured content production and distribution deals with YouTube, improving these broadcasters' audience reach and diversifying their ad revenue streams outside their home markets.

Major Broadcaster-Streamer Collaborations in 2025-2026



Sources: IAMT MediaTech Industry Tracker, European Digital Media Observatory (EDMO)

Europe – Business Environment

Cost cuts continue as broadcasters shift focus to streaming and live sports

Major European broadcasters continue to close down or restructure their linear operations in order to develop their BVOD (Broadcast Video on Demand) and streaming services, which still lag far behind global streamers in terms of audience reach and viewer awareness. In 2025, job cuts and savings programs were announced across Europe. For example, the BBC, ITV, Channel 4 and Sky said they will reduce production output following lower commercial income and reduced public funding. In April 2026, the BBC announced that it will cut up to 2,000 jobs to save 10% of its annual budget (~ £500mn) by 2028, citing inflation, pressures on license fees as well as a turbulent global economy. In Germany, public broadcasters like ARD and ZDF as well as a major commercial broadcaster RTL Deutschland announced sizable job cuts to boost operational efficiency and their streaming business, BVOD services and FAST channels. Smaller national broadcasters like the Belgian RTBF, the Finnish YLE and the Swiss SBC also announced major budget reductions and staff cuts in 2025, aiming to reallocated resources and investments in streaming technologies, content management and processing.

As sports rights' costs continue to increase, European broadcasters are splitting media rights and focusing more on local and niche sports, and a more effective way to monetize these live events. This is driving investment in ad technology, digital rights management and improved viewer engagement. In live sports specifically, cloud-based media asset management systems are becoming very important, enabling the automation of metadata generation, the creation of AI-generated highlights as well as real-time analytics.

> *The major change in the business is that most people are leaving the linear channels. In December [2025], we started some linear channels that are not broadcasted, but only available on our website and a mobile application. We see that 50-60% of the audience is non-linear. They are only on the digital platform. It is a huge percentage, because it was not planned this way.*

Public Service Broadcaster
Europe

Source: IAMT

Europe – Technology Investment

ROI and “time to value” are key drivers of business transformation

Reduced government funding, license fees and linear ad revenues are forcing European media companies to prioritize return on investment (ROI), total cost of ownership (TCO) and seek faster “time to value”. This means adopting new ways to measure the actual performance of software-driven solutions and develop measurable outcomes together with vendors through a trust-driven partnership approach. However, the challenge is that media businesses, especially public service media, quantify value in different ways. Especially as public service broadcasters will not be seeking profitability as their main objective. Due to a lack of standardized performance metrics across media organizations it can be challenging for buyers and vendors to discuss business transformation objectives with clarity. Transparency can also be an issue as some vendors noted that customers do not want or cannot tell how much demolishing an obsolete solution and replacing it by a new one will cost, because they fear that revealing the payoff figure will make vendors raise prices in sales negotiations. Therefore, building trust between buyers and vendors has become critical for evaluation.

The adoption of more agile infrastructure is also difficult due to “legacy dept”. Typically, broadcasters have built their fixed hardware and first generation on-premesis solutions one after the other, and lack commonality due to being deployed over a hierarchical timeline. To address this, MediaTech vendors highlighted that broadcasters are increasingly interested in containerization, microservices and emerging technologies such as Media eXchange Layer (MXL) and Time Addressable Media Store (TAMS), enabling broadcasters to connect their legacy systems to software-defined solutions.

In Europe, the high density of public service broadcasters – whose engineering teams were cited to typically have a relatively high median age – means that there many different labor unions and legislations protecting the rights of employees. Some broadcasters in the region reported difficulties in adopting solutions that could automate human tasks and make many existing job roles redundant due to the existing labor unions contracts and the political pressure to avoid negative news related to job cuts in public media organizations. To address this challenge, some broadcasters have reduced the number of contractors they have, especially in the production and the gallery, to lower their overall project costs, when they cannot make redundant their own employees.

Source: IAMT

Europe – Technology Investment

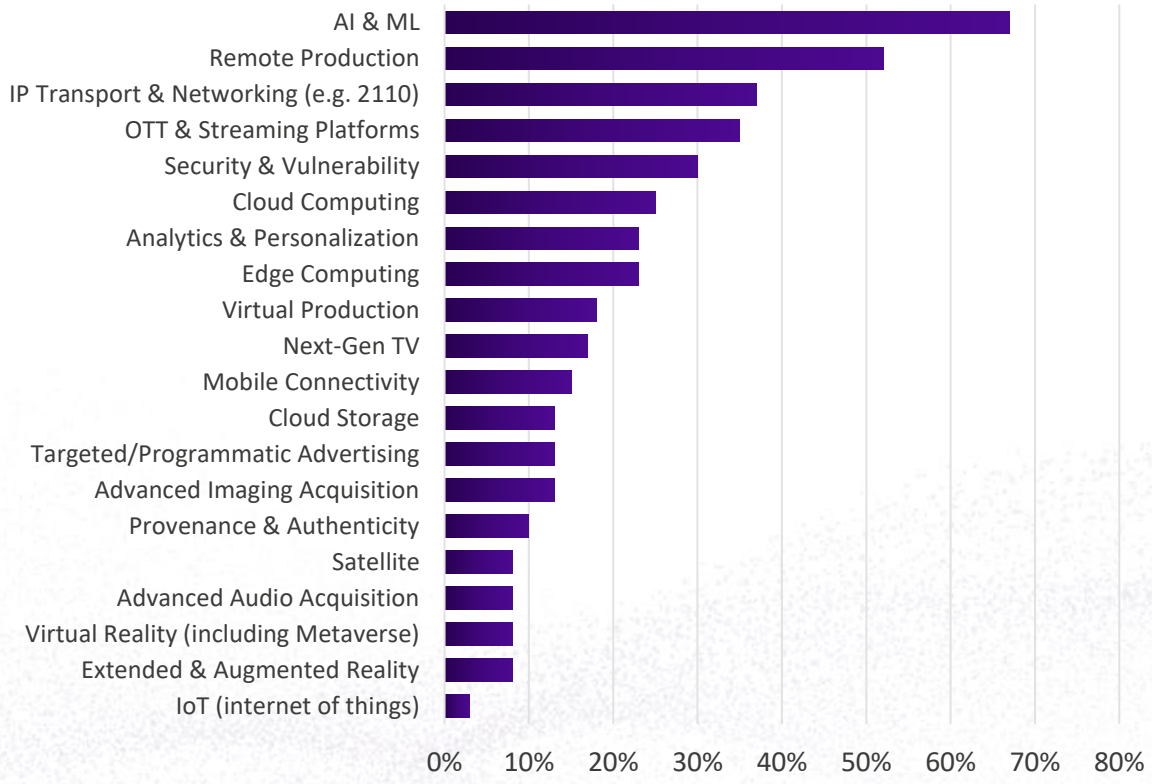
Investment in AI and remote production is driven by live sports

AI & ML remains the most important technology in European tech roadmaps, followed by remote production and IP transport & networking. Growing demand for live sports and live experiences is driving investment in AI-led post-production, content management as well as remote workflows in Europe, where numerous public service broadcasters and commercial media companies have a wide range of regional and national sports leagues and games to cover and to localize for different language groups and diverse audiences.

The high cost of media rights for premium sports are driving European broadcasters to increasingly share sports rights between each other, enter content bundling agreements and shift focus from tier 1 sports to local leagues and niche sports. This is driving investment in software-defined workflows as well as hybrid cloud production. The cloud and IP networking are fundamentally transforming how live sports are produced, as media businesses now adopt “event-agnostic” infrastructure, which allows multiple simultaneous productions.

Suffering from continuous cost pressures, European news organizations continue to invest in efficiency and automation, and they are adopting a story-centric approach, which significantly reduces news’ time to market as well as duplication of effort. While AI tools have become critical in summarizing, captioning and versioning content, Gen AI remains a double-edged sword for newsrooms – many increasingly worry about fake news, disinformation and AI-generated content, leading to investment in content provenance and authenticity (e.g. C2PA) to preserve audience trust. News broadcasters are also worried about cybersecurity and digital sovereignty due to recent changes in the geopolitical environment.

Trends in Tech Roadmaps - Europe



Q. What are the most important trends in your organization's technology roadmap? (All industry, Europe, Q1 2026 n=60)

Source: IAMT MediaTech Industry Tracker

Europe – Technology Investment

Agentic AI is improving innovation capabilities and supporting business decisions

IAMT data shows that AI remains the most important technology in European media businesses' tech roadmaps, driven by the emergence of Agentic AI tools and Generative AI. Broadcasters stated that they already deploy AI throughout the media supply chain to automate tools and production systems, to reduce the workload - and workforce – on teams as well as introduce new innovations which they could not have achieved before. However, many broadcasters are still struggling with the quality of their data and how to standardize their metadata.

Media asset management (MAM) continues to be the most critical area to deploy AI due to the diverse benefits that AI-based metadata tagging has across the media supply chain ranging from improved content discovery, time-to-market, multiplatform monetization and viewer engagement. Augmented metadata also has a measurable return on investment and explicit "time to value", being among the most important investment criteria for MediaTech buyers. For example, a major European broadcaster said that they are seeing a direct ROI through increased ad revenue after they adopted AI to extract semantic information from the video that is then sent to the ad system, which can sell the ads at a higher price thanks to the improved ad insertion done through an AI-based contextual and sentiment analysis.

Traditional broadcasters – facing pressure from streaming services, the creator economy and social media platforms – are looking to deploy Agentic AI to automate video analysis, creative development and archive management by empowering agentic systems to coordinate and make autonomous decisions without a constant human in the loop. According to several broadcasters, the main obstacle in adopting Agentic AI relates to a cultural challenge around oversight and human supervision.

> *An enterprise layer of Agentic AI is developing very fast, which will have a tremendous impact on how you can scale, reducing time to value. Agent to agent [multi-agent technology] means that you are scaling on platform and not on headcount. Timeframes and windows of opportunities are closing faster and faster, making time even more compressed to make decisions on technology investment.*

MediaTech supplier
Europe

Source: IAMT

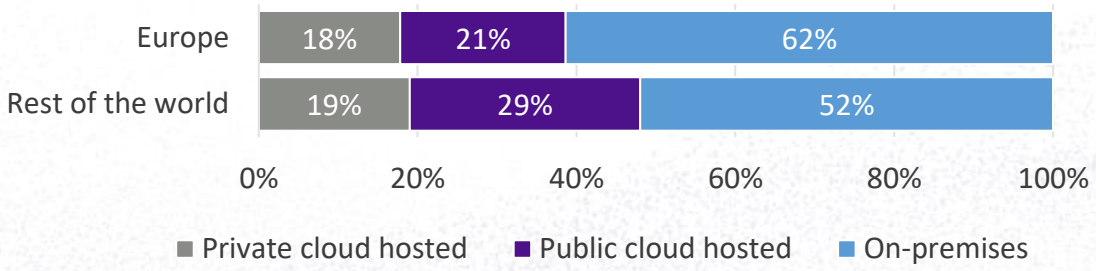
Europe – Technology Investment

Cloud investment is now guided by concerns related to digital sovereignty

While the investment in hybrid cloud continues, MediaTech buyers in Europe are increasingly concerned about digital sovereignty and cloud security. Recent drone attacks on AWS' data centers in the Gulf countries as well as European companies and institutions' dependence on American public cloud services have made many broadcasters change their cloud strategy and invest more in local cloud services, sovereign AI and data provenance to reduce the exposure to geopolitical and operational security risks. For example, one MediaTech vendor told us that recently one of their European public service broadcast customers preferred to delay the project by six months due to the lack of compute resource on premises instead of using the compute available in a cloud, because they were concerned about digital sovereignty.

Addressing these concerns the European Broadcasting Union (EBU) – the alliance of over 110 public service broadcasters – published a cloud ecosystem strategy for European public service media in 2025, helping them to evaluate and adopt cloud solutions through a decision model that retains operational independence and compatibility with European sovereignty considerations. The EBU has established its own Cloud Group, a working group to help all public service broadcasters to reach the same level of understanding of the available European cloud services that are already being deployed by public service media in major regional markets like Germany and France so that it will be easier for others to follow and move to around 3-4 major cloud operators in Europe. For example, Germany is currently using STACKIT sovereign cloud as well as OpenStack, while French broadcasters have moved to Scaleway sovereign cloud and adopted Kubernetes. The Cloud Group of the EBU helps European public service media to adopt a common approach to cloud integration in a peer-to-peer environment. Citing a need for resilience and strategic autonomy, the EBU also announced a partnership with Nvidia in July 2025, which aims to advance European cloud infrastructure and sovereign AI services for public service media.

Allocation of existing core infrastructure investment



Q. In approximate percentage terms, how would you describe the allocation of your media organization's existing core infrastructure investment? (End users, Q1 2026, n=19 to 29)

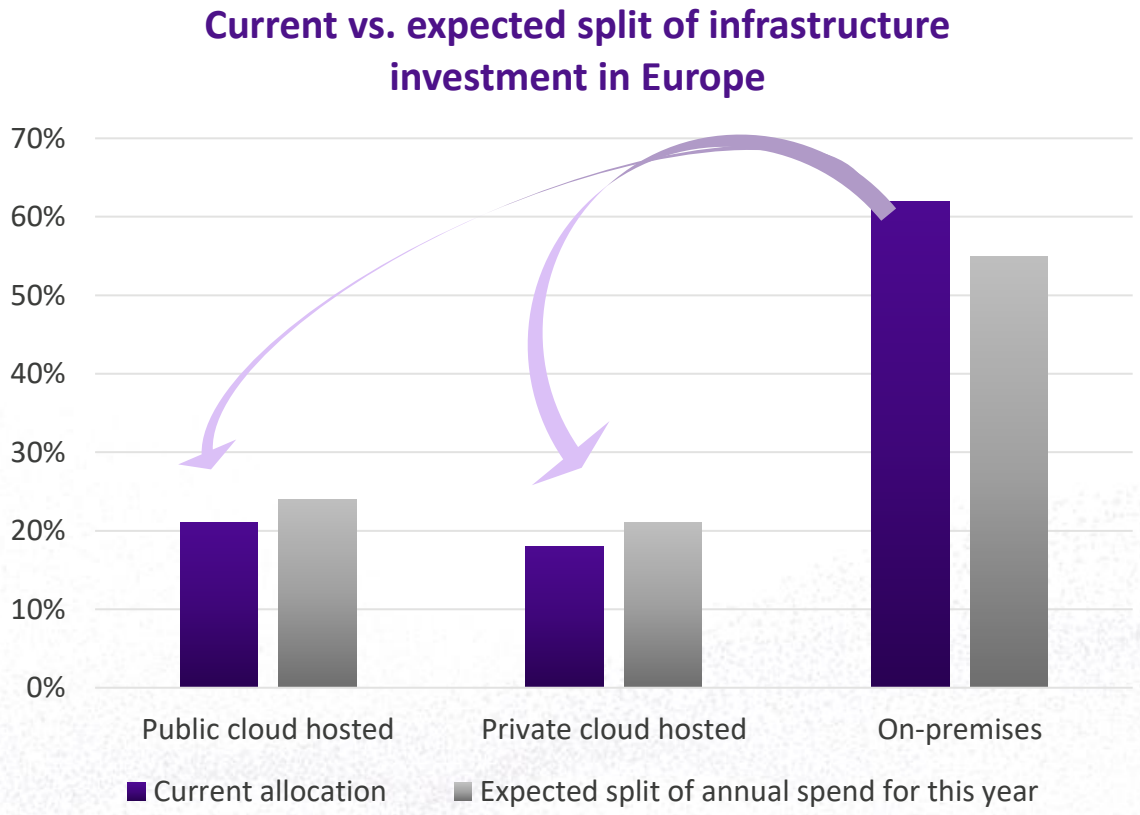
Sources: IAMT, EBU

Europe – Technology Investment

European media and production companies are less reliant on public cloud

European media businesses are less reliant on public cloud compared to other geographies, and operations that are kept on-premises remain important in a more uncertain geopolitical environment. Seeking ways to avoid vendor lock-in and reduce cloud costs, European media companies are supporting Time Addressable Media Store (TAMS) open-source technology, which significantly improves the efficiency of cloud-native and IP-based workflows by optimizing the way media is stored, accessed and used. In February 2026, BBC R&D – the developer of the technology – announced that TAMS is moving to open governance due to the growing number of systems, solutions and products built on the TAMS API.

Another emerging technology supported by the EBU is Media eXchange Layer (MXL), which enables media businesses to transfer uncompressed content between processes by either sharing the same node or over a network with notably improved efficiency and interoperability. Especially in Europe, both TAMS and MXL initiatives are strongly associated with sustainability and energy efficiency, which remain important criteria for European MediaTech buyers. In March 2026, MXL reached an important milestone with the release of MXL v1.0.0 Release Candidate, which "freezes" the API and feature set of the MXL SDK, providing developers and vendors a stable base to prepare for wide implementation knowing that the core interfaces will not be changed further.



Q. In approximate percentage terms, how do you expect your annual spend for this calendar year to split between the following infrastructure? (End users, Q1 2026, n=18 to 28)

Sources: IAMT MediaTech Industry Tracker, BBC

Europe – Technology Investment

Remote production and hybrid production

Along with the maturing adoption of IP networking and the expanding hybrid SDI/IP environments, European media businesses continue to transition to remote and distributed production to enable more flexible operations of the increasingly smaller production teams covering more events and producing more content with the same or less resources. This shift in the production model is not only driven by cost savings, but also the advancing technology and tools enabling low latency, maturing skills to produce content differently as well as the requirement to adapt the content to different distribution channels at the end of the media supply chain. However, the "legacy debt" – the significant existing installed base of traditional hardware – as well as the deeply rooted culture of sending an outside broadcast (OB) vehicle and the crew on site to major sporting events are slowing down the move to fully remote production. For example, one major public service broadcaster in the region told us that they invested in new OB vans only 2-3 years ago to cover the Paris Olympic Games in 2024 and reselling the OB vans now would be so costly and challenging that they prefer to continue producing live sports using their traditional model. At the same time, the same broadcaster is testing highly advanced 5G broadcast and private 5G in premium live sports, showing significant innovation capabilities.

Over the past two years, cloud-based streaming technology has improved significantly thanks to the mix of IP-based infrastructure, multi-cloud setups, emerging technologies like private 5G as well as better integrations between venues and broadcasters, now allowing very low latency transmission. Media businesses are also learning to aggregate multiple technologies together through a unified IP infrastructure, allowing them to implement cloud computing for remote production of secondary streams of content dedicated to social media platforms. The most advanced end-users are already moving from traditional remote production to live production in the cloud, enabling production teams to produce more games remotely from home in shorter time periods.

5G connectivity is playing an increasingly important role in the move towards remote, distributed production and live cloud production, as private 5G networks and purpose-built private 5G solutions increasingly complement public networks by ensuring secure and robust connectivity for live workflows. The Paris Olympic Games (2024) and Milan-Cortina Winter Olympics (2026) have recently acted as a major platform for European broadcasters to test new technologies such as private 5G and 5G broadcast, helping them to innovate and demonstrate the benefits of each technology in real-world use cases..

Source: IAMT

Europe – Technology Investment

Social media platforms are leading the way toward a mobile experience of everything

European media businesses – especially news organizations – suffering from severe cost pressures and declining ad revenues continue to adopt more consumer-style equipment and ProAV systems, enabling them to produce more content with less resources as well as address growing demand for vertical viewing on smartphones. The significantly improved quality of smartphone cameras such as the latest iPhone 17 Pro Max have enabled advancements in mobile journalism (MoJo) and dedicated content production to multiple social media platforms. As newsrooms are getting virtualized, media businesses have more flexibility and options to mix different IP protocols and IP technologies used by both broadcast-grade and ProAV solutions. IP protocols for contribution and remote production – SRT, RIST, Zixi, WHIP, WebRTC and NDI – are now standard on hardware encoders, software gateways and mobile journalism tools.

Sports leagues and clubs in Europe are investing in more professional content production, mixing the use of smartphones, ProAV systems and broadcast-grade technology across different tiers of sports events, using IP workflows and 5G networks to feed OB trucks and cloud switchers alongside traditional systems. Sports leagues are increasingly creating different tiers of content ranging from the actual live game, highlight packages and high-quality documentary productions to lower tier fan engagement footage from trainings and AI-generated content for social media. The growing diversity of content produced by non-broadcast organizations is accelerating the democratization within the media market vertical, favoring MediaTech vendors who offer accessible, cloud-native web-based tools that do not require direct sales interaction between the vendor's sales team and the content creator.

> *We've changed the way we procure technology. 10-15 years ago, if it didn't say "broadcast" on the side, we didn't buy. The cost didn't matter. Today, we've shifted it all around - everyone has a personal iPhone with a technology on it to broadcast live whatever happens. […] We are looking closely at getting the most value for our money and a lot of time it is not the professional broadcast department, in which we invest our money.*

Public service broadcaster
Europe

Source: IAMT

iamt

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> *There are a lot of headwinds in macroeconomics. All these trade wars are worrying customers, so they are very cost conscious right now.*
>
> MediaTech Supplier
> Asia-Pacific

Asia-Pacific

Regional MediaTech Trends

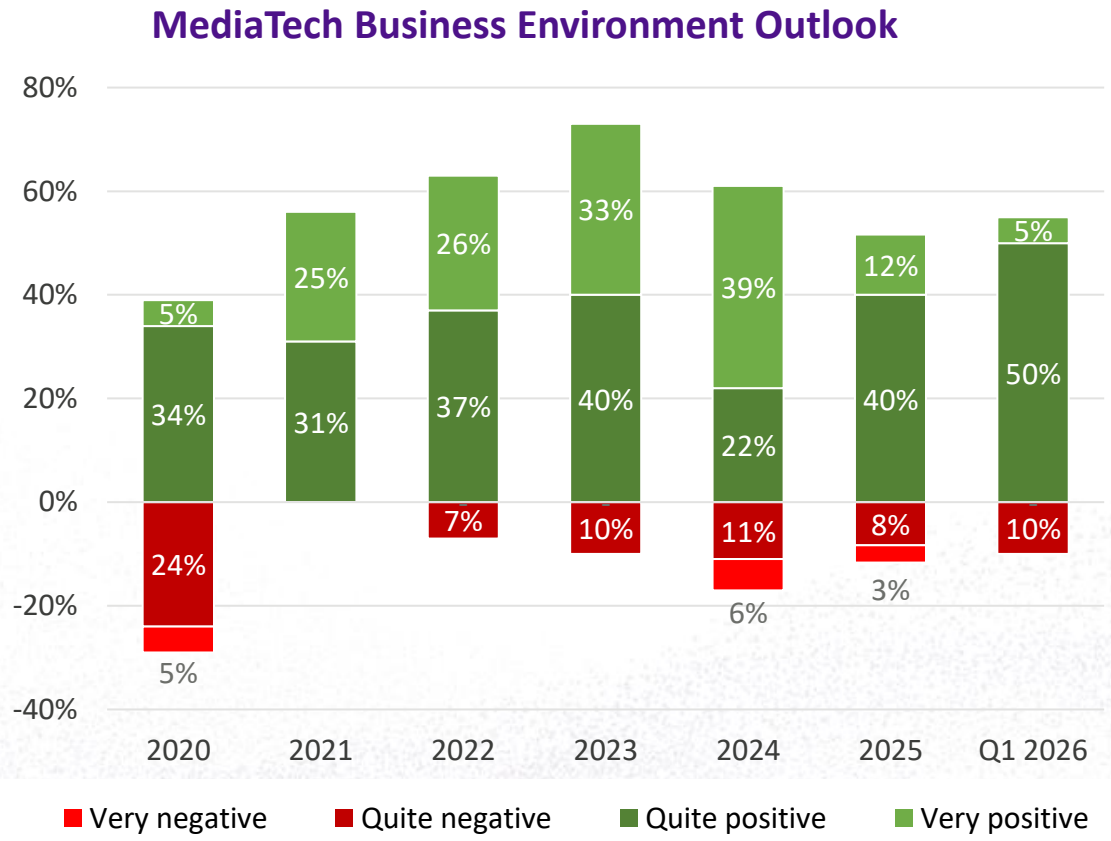
theiamt.org/biu

Asia Pacific – Business Environment

Budgets remain tight, but broadcasters' confidence in new technology is growing

Broadcasters' overall budgets remain as tight as in 2025 due to declining linear revenues, accelerating their move to over-the-top (OTT) streaming and social media publishing – the creator-led platforms are now the single largest growth engine in the region's online video ecosystem. Linear broadcasters are facing long-term structural erosion, resulting in consolidation, restructuring and cost cuts. However, the business environment outlook in the region improved compared 2025, as broadcasters are becoming more open to trying new technologies like IP networking and remote production to achieve cost savings and efficiency gains.

Growing demand for live content and free streaming services (e.g. AVOD, FAST channels) are inducing content partnerships, service bundles and distribution deals between broadcasters and telecom operators. The ability to monetize premium live experiences has become critical in the competition with streamers and social media platforms, taking over tier 1 sports rights and making more sports events available through free models. Asian broadcasters are increasingly leaning into a "total video" model, blending free-to-air broadcast, connected TVs, streaming platforms, short-form video and social content together to monetize rights and IP more effectively across an increasingly fragmented consumer landscape. This is driving investment in dedicated mobile and CTV apps for sports and news as well as intelligent advertising systems for mobile streaming.



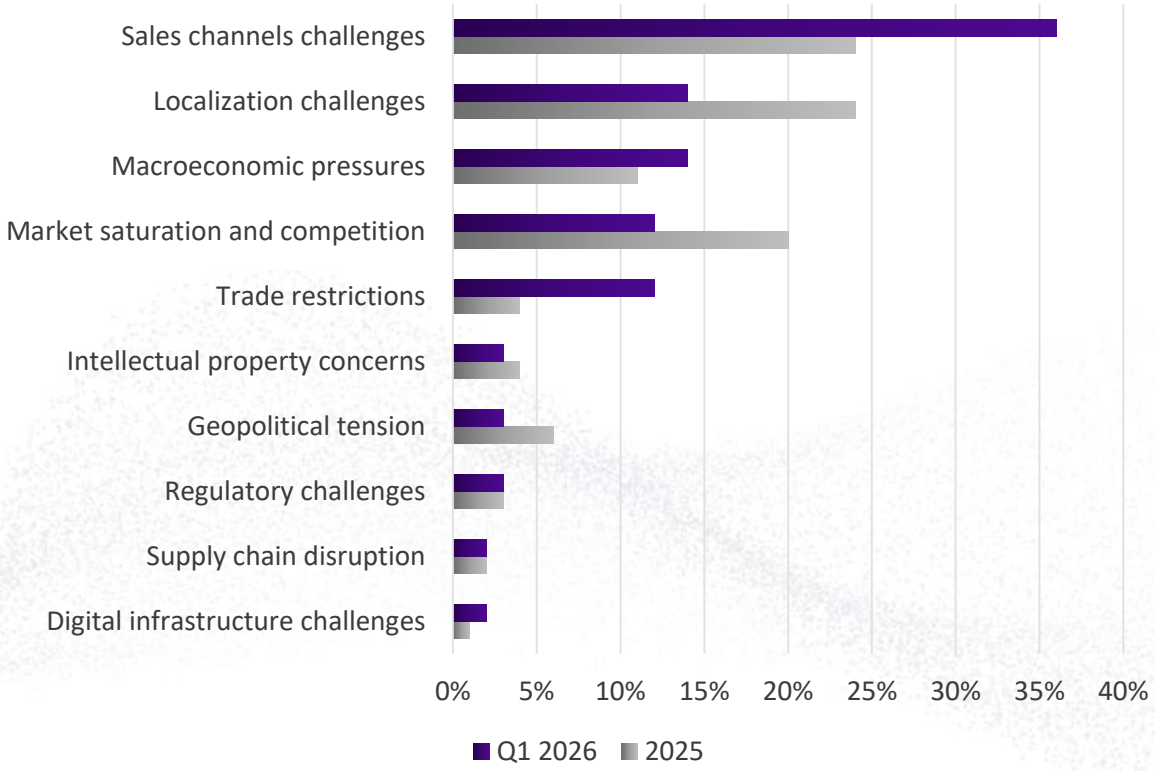
Q. What is your organization's outlook for the overall business environment over the next year? (All industry, Asia Pacific)

Sources: IAMT MediaTech Industry Tracker, Media Partners Asia (MPA), Variety, apb-news.com

Asia Pacific – Business Environment

Geopolitically-driven trade restrictions are resulting in protectionism

Regional barriers to growth in Asia



Q. What is the major regional barrier to the growth of your business in each of the regions where your company operates? (All industry, Asia 2025 n=123, 2026 n=59)

Sales channels challenges

Uncertainty around trade restrictions combined with macroeconomic pressures are reducing investment activity, decreasing vendors' margins, increasing price pressures and narrowing sales channels.

Geopolitical tensions - Internalization

Broadcasters are increasingly internalizing and localizing their operations, supply chains and technology infrastructure due to rising geopolitical tensions and security concerns related to cloud and AI services.

Competitive landscape

Linear broadcasters and IPTV service providers are facing fierce competition from streaming services and social media, which have become major platforms to watch movies, local dramas, micro series and sports content (live and non-live). Amid decreasing ad revenues, local broadcasters are investing in live sports, driving demand for the adoption of remote production.

Source: IAMT MediaTech Industry Tracker

Asia Pacific – Business Environment

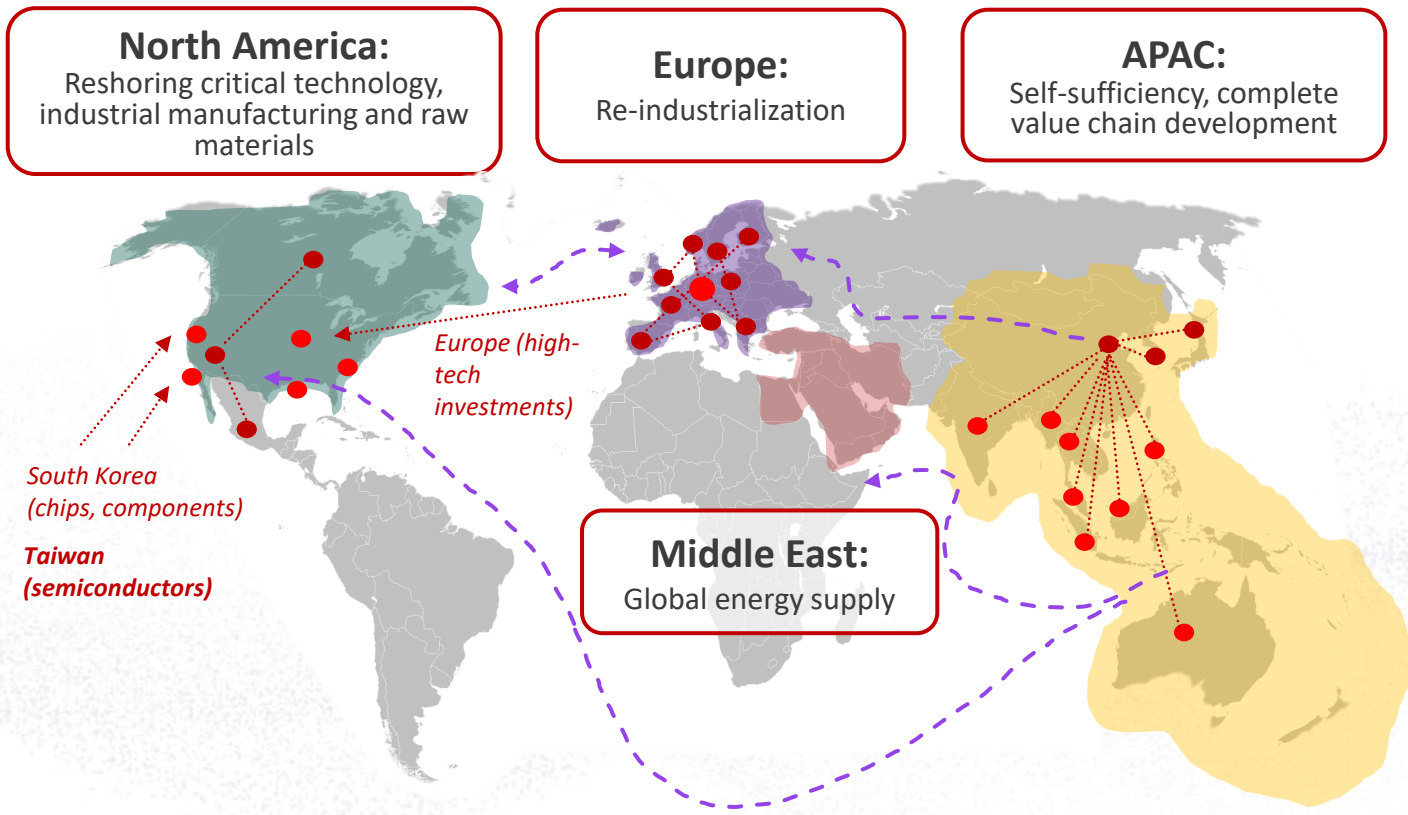
Geopolitical tensions are reshaping global supply chains, localizing APAC's ecosystem

Global supply chains are going through a transformation, as national governments and regional markets with similar interests are aiming to secure access to critical components, raw materials and resources needed for a large-scale adoption and processing of AI.

In Asia-Pacific, the US tariffs and geopolitics are accelerating the "internalization" of media operations in major markets like China, which has a spillover effect on the whole region, as compatibility and interoperability with Chinese technology remains important for broadcasters across the region. This is translating into growing price pressure and the development of more region-specific MediaTech solutions (e.g. APAC ad-signaling workflows and audio in broadcast). For example, China Broadcasting Network has recently built the "Smart AI-Powered Backbone", a nation-wide AI-automated content processing platform using only local technology.

The Chinese government has positioned semiconductors as a strategic focus in its five-year plan for 2026-2030, aiming to increase semiconductor self-sufficiency to 80% and mandating that chipmakers use at least 50% Chinese-built equipment when constructing new plants. The Japanese government also announced a "financial assistance" of ~$20bn for a Japanese semiconductor manufacturing company, Rapidus, to start mass production of advanced chips in 2027.

Transformation of global supply chains



Sources: IAMT, WDI, Roland Berger, Nikkei Asia, Goldman Sachs, NHK

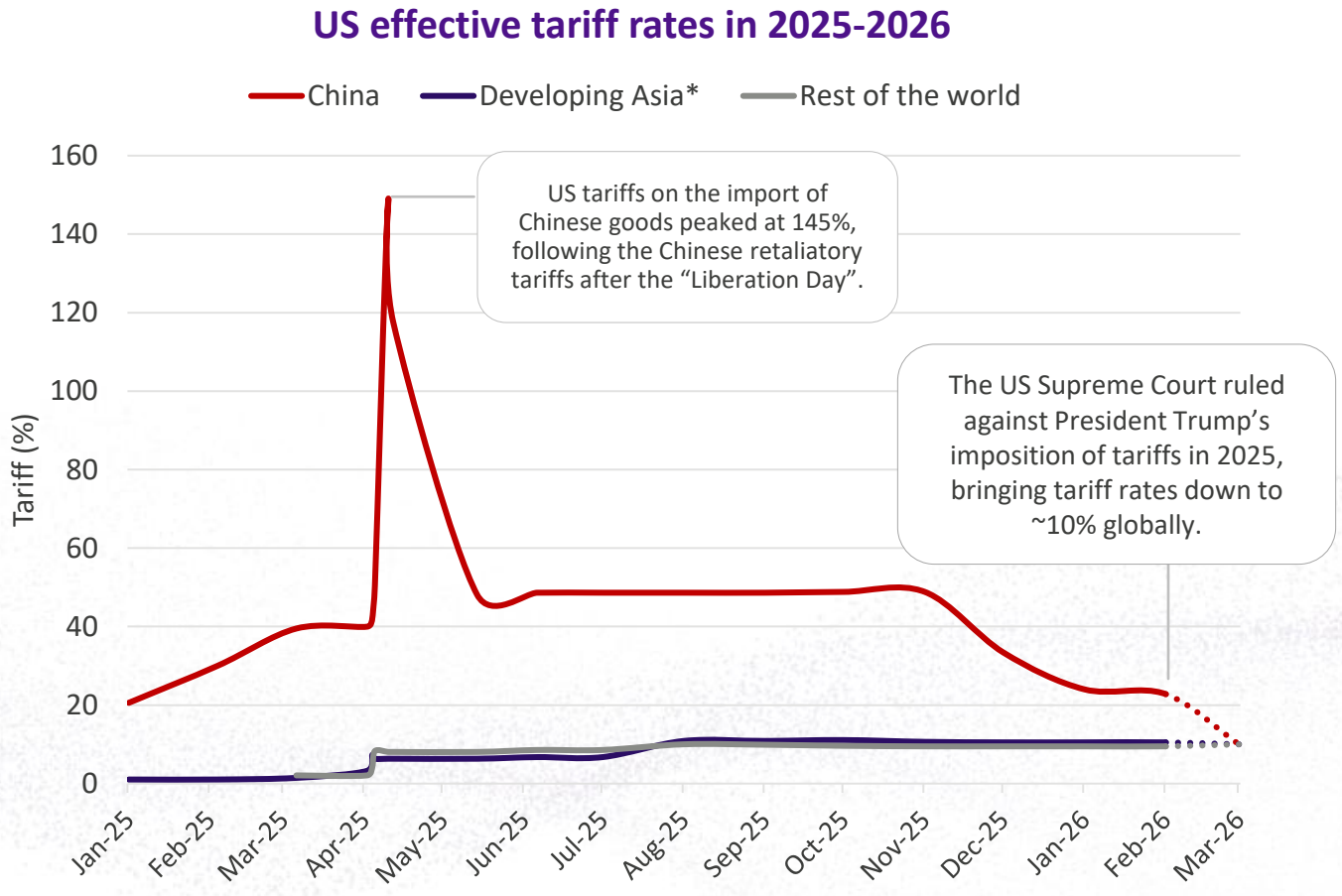
Asia Pacific – Business Environment

Tariffs and global memory shortages are driving hardware price increases

The US tariffs continue to cause uncertainty in the market amid price pressures on hardware and technology products manufactured in Asia, especially China. This has led to price increases of components and IT hardware to maintain hardware retailers' margins.

Skyrocketing demand for AI chips has caused a global shortage of memory chips, which is expected to last until 2030. Contract prices for conventional dynamic random access memory (DRAM) chips and advanced high-bandwidth memory (HBM) chips – the latter being a key component in AI chips – increased by over 50% QoQ in Q4 2025*. In May, Samsung – the world's largest memory chip maker – said its pricing rose 90% in Q1 2026, which has resulted in prices pressures for companies like Dell and Apple.

Spillover effects from AI demand have doubled contract prices for older memory chips' (DRAM technologies e.g. DDR2, DDR3) used in IP cameras, routers, gateways, network equipment as well as consumer electronics (e.g. smartphones, laptops, game consoles, VR headsets), causing shortages in production of chips, chip substrates and probes for chip testing. The memory shortage is also translating into price increases for integrated AV systems such as B2B displays (e.g. LCD and dvLED displays) used digital signage, media processors, embedded boards and other AV solutions using memory.



Sources: IAMT, Asian Development Bank, Penn Wharton Budget Model/University of Pennsylvania, avinteractive.com

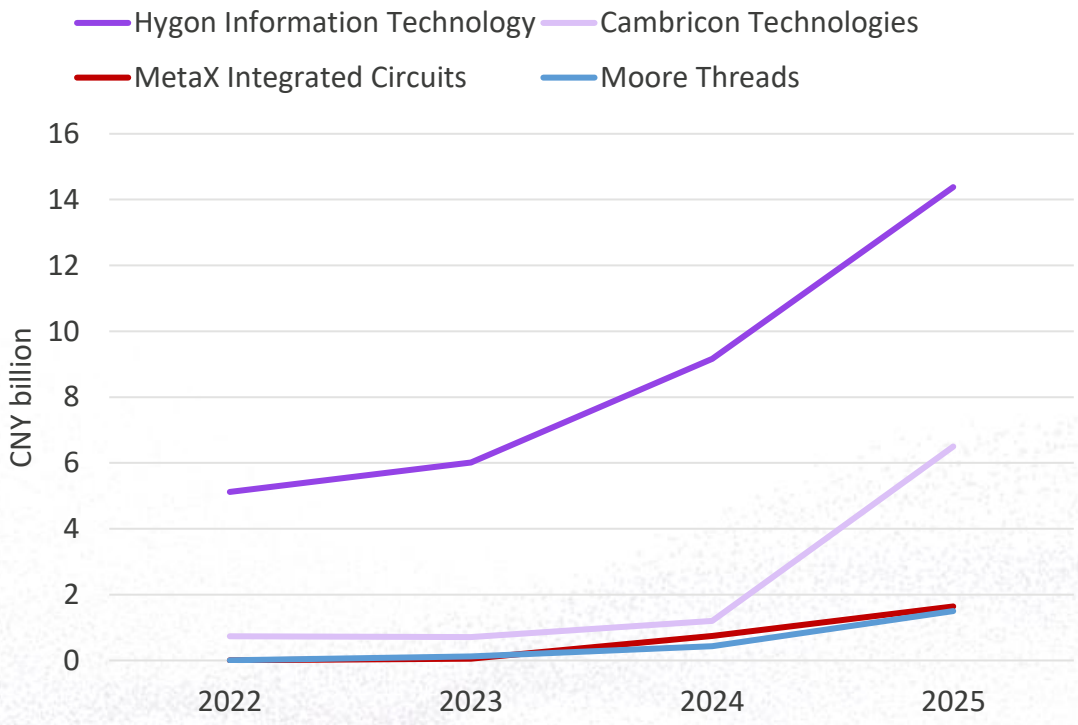
Asia Pacific – Business Environment

Geopolitical uncertainty is driving users towards Chinese chips and compatibility

US export restrictions on advanced chips has significantly accelerated China's self-sufficiency in AI processors, evidenced by the emergence of at least nine Chinese chip companies shipping a threshold of over 10,000 units per year – this reflects Chinese AI chips' improved performance, cost-competitiveness and stability. Benefiting from massive domestic demand, Huawei's Ascend, Baidu's Kunlun and Alibaba's T-head as well as smaller AI chip brands like Cambricon and Moore Threads are running a large-scale industrial "trial and error" proof of concept on domestic AI processors, enabling more skills-based and specialist AI training methods that require significantly less raw computing power. China's top chipmaking manufacturers – Naura, AMEC, ACM Research and Piotech – are also experiencing record growth driven by the Chinese government's self-sufficiency program.

Geopolitical uncertainty is driving users towards Chinese chips also in the wider APAC region, as developers shift their focus to compatibility layers for cheaper Chinese alternatives, significantly reducing Nvidia's ecosystem advantage. In March 2026, the Chinese government banned the import of Nvidia's H200 chips, which were initially customized to the Chinese market. In April, the Chinese LLM DeepSeek launched V4, the latest generation of its low-cost open-source AI model being redesigned to now run on Huawei's Ascend AI chips instead of Nvidia's chips. Jensen Huang, CEO at Nvidia warned the US government that the compatibility between Deepseek and Huawei can create an independent tech ecosystem in China, which could end up displacing American technology standards globally.

Annual revenue of China's top AI chip developers



Sources: IAMT, Company Filings, Nikkei Asia

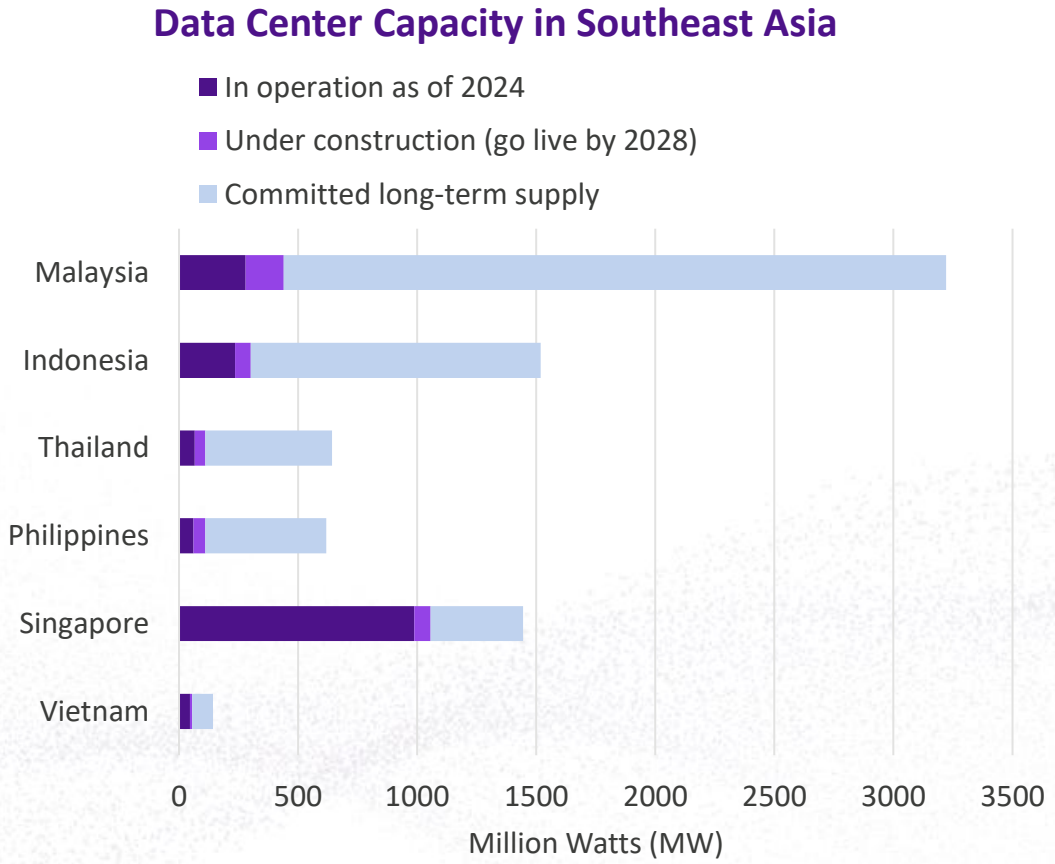
Asia Pacific – Business Environment

Growing data center capacity is fueling regulations to improve digital sovereignty

Investment in new data center capacity is growing rapidly in the APAC region, driven by the demand for AI inference enabling the deployment of AI models. AI inference requires "localization" of data processing, accelerating the use of edge computing and distributed cloud. Large cloud service providers are expanding their CapEx, especially in Southeast Asia to ensure that data and infrastructure are on shore – this is critical due to rising geopolitical tensions and trade restrictions.

Cloud adoption is increasingly associated with concerns over data sovereignty, making some Asian broadcasters more risk averse and favor a local service provider and a local telecom operator for media transport. Political guidance in many government-backed Asian broadcasters – typically having flexible decision-making structures – is translating into relatively fast changes in their technology roadmaps.

Authorities across Asia-Pacific are tightening regulations over data privacy and cross-border data management, making data sovereignty a new architectural requirement. Many countries have recently updated their old data privacy laws. For example, Singapore has made amendments to its Personal Data Protection Act (PDPA), Australia to its Privacy Act (APP 8) and Japan amended its Act on the Protection of Personal Information (APPI), targeting AI advancement and cloud security. In addition, South Korea's Personal Information Protection Act (PIPA), Indonesia's Personal Data Protection Law (PDP Law), Vietnam's Cybersecurity Law and Philippines's Data Privacy Act (DPA) all now require organizations – including media companies – to be able to prove exactly where their data is flowing. This is driving investment in cloud security as well as solutions using direct-routed architecture – eliminating the vendor cloud from the traffic path completely – and Zero Trust network access solutions.



Sources: IAMT, Deloitte, *TrendForce, appgate.com

Asia Pacific – Technology Investment

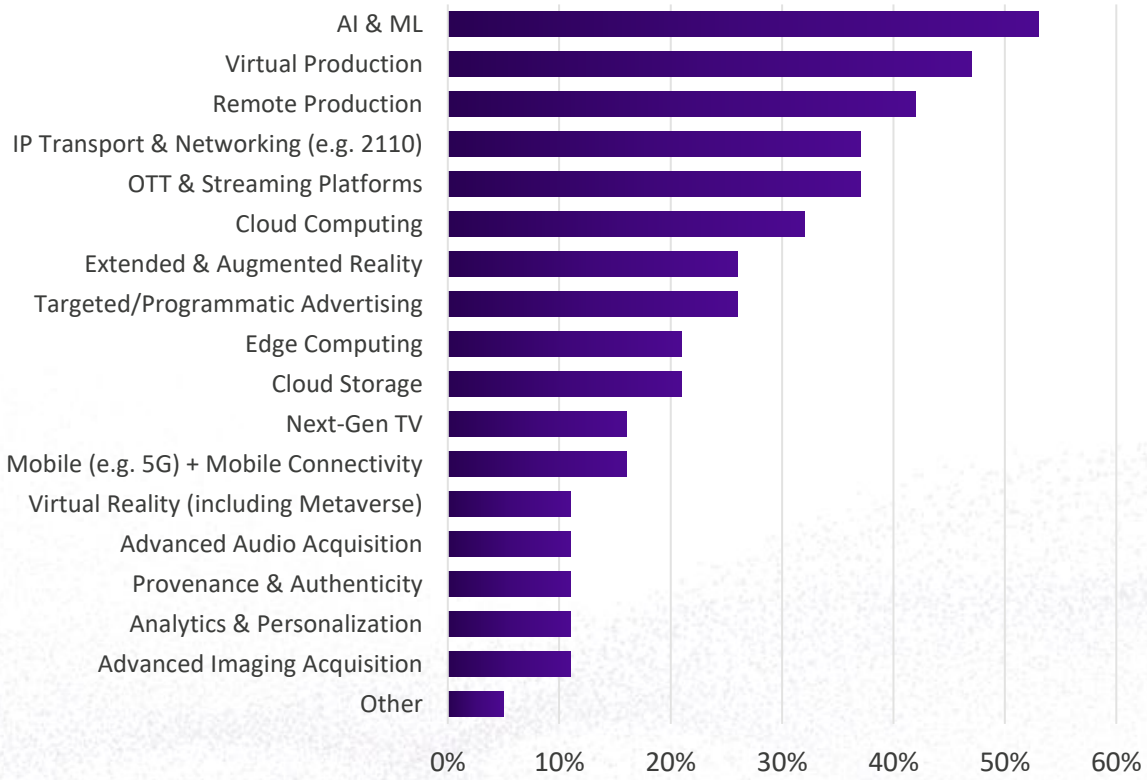
Demand for AI tools and virtual production are growing, driven by cost efficiency

AI & ML remains the most important technology in Asian companies' technology roadmaps, driven by the adoption of Generative AI as well as the ambitious national AI strategies in major regional markets like China and India. The adoption of AI is advancing rapidly in the production space, providing broadcasters more capabilities and more resources to do more productions. In post-production, AI is widely used in transcribing and summarizing content as well as to localize content – this is very important in the region characterized by numerous local languages and dialects. For example, Korean TV networks like SBS announced in March 2026, that its entertainment shows in the second half of the year will be "fully augmented" with AI. Another Korean broadcaster, EBS, said that it has been able to reduce the production cost per episode of its programming from about $6,600 to below $4,600 by adopting AI.

Virtual production is growing in importance in tech roadmaps in the region, driven by the need for cost efficiency and advancements in AI-driven technology enabling automation, more immersive and visually dynamic scenes. In Q1 2026, China announced AI FILMS Studio initiative, which aims to build the world's largest AI virtual film studios across several provinces, offering film makers LED volumes, AI asset libraries and AI-automated workflows, which can compress the production time from months of location shooting into days of fully indoor virtual production.

Currently, the absence of comprehensive legal frameworks governing the use of AI in film and television production has resulted in media companies' rolling out their own rules and guidelines. In news production, the standards are stricter and broadcasters focus on maintaining audience trust through investment in provenance and authenticity.

Trends in Tech Roadmaps - APAC



Q. What are the most important trends in your organization's technology roadmap? (All industry, Asia Pacific, Q1 2026 n=19)

Sources: IAMT MediaTech Industry Tracker, asianews.network, studio.aifilms.ai

Asia Pacific – Technology Investment

Cost pressures are accelerating the adoption of IP and remote production

The adoption of IP is picking up in the APAC region, enabled by the advances in computing power and bandwidth. Reducing cost of IP deployments and improving skillsets are driving the shift toward IP hybrid setups, whereas maintaining SDI islands is becoming more expensive. Government-funded broadcasters with bigger budgets are adopting SMPTE ST 2110 and ST 2022 especially for greenfield projects.

While satellite free-to-air television as well as terrestrial broadcasting both remain important in the geographically dispersed APAC region, cost pressures and budget cuts are forcing broadcasters to reduce the cost of media transport and increase the use of public internet or enterprise-grade unmanaged networks. Internet delivery is turning out to be more resilient and cost-efficient than fiber or satellite distribution (as satellite contracts start to come to an end in the region), and broadcasters are starting to use SRT as their preferred method for linear distribution. This is accelerating the adoption of SRT, RIST and Zixi protocols to transport video and audio reliably across different networks. Broadcasters are finding that hardware-accelerated SRT and edge gateways can reduce latency and improve reliability, being critical for APAC's distributed production ecosystems.

In Japan, the government changed the domestic broadcasting law in October 2025, making it mandatory for media companies such as the public service broadcaster NHK to broadcast and provide both the IP service and digital terrestrial television (DTT) distribution. Some commercial terrestrial broadcasters in Japan like TVer are also offering IP simulcast streaming (AVOD) services.

Improving connectivity and the growing demand for live streaming of sports are driving broadcasters to invest in remote production and build centralized facilities enabling IP and hybrid cloud production at a lower cost. This is important for Asian public service broadcasters many of which still rely heavily on digital terrestrial television (DTT) distribution – being mandatory for them to cover even remote areas with antennas – and who are challenged by the very high maintenance costs which are associated with DTT network infrastructure.

Today, many Tier 1 sports broadcasters are using satellite uplinks, old outside broadcast (OB) and SNG (satellite news gathering) vehicles due to the reliability and wide reach of satellite distribution. Several of them are starting to move from arena-based production setups to centralized studios, enabling remote production.

Streaming services – including FAST service providers – are aggressively entering the premium sports market in the region, driving the move to remote production workflows. For example, a Japanese FAST service provider, Abema TV, streamed all the matches of the World Cup 2022, making it the first OTT service covering a major sporting event outside the public service media. OTT platforms like DAZN in Japan and NAVER Sports in South Korea have bought media rights for the FIFA World Cup 2026.

Sources: IAMT, FIFA

Asia Pacific – Technology Investment

Hybrid cloud remains the most common deployment method

The adoption of cloud is maturing in the APAC region, as media businesses seek to improve their total cost of ownership (TCO) and bring satellite transport costs down. Government-funded broadcasters and media rights owners are increasingly investing in local cloud infrastructure such as private cloud setups. At the same time, global public cloud service providers are building up data centers in the region, enabling higher bandwidths and IP links directly connected to the sports venues.

Hybrid architectures remain the most common method of cloud deployment due to the higher costs of public and private clouds compared to on-prem setups. Typically, broadcasters may keep the main system and the "heavier" workflows such as CDN operations on-prem, while some lighter workflows like monetization and disaster recovery can run in a public cloud. However, many less resourced commercial broadcasters with smaller teams are finding cloud too costly and complex to operate, making them adopt more traditional REMI production using SRT links. The move to remote production and hybrid cloud are accelerating demand for managed services.

Due to rising geopolitical tensions, regional experts told us that customers increasingly want to build their own data centers, which are interoperable and can expand into different clouds to avoid being locked into one cloud provider. For example, a broadcaster might be using NDI or SRT through either a public cloud, public internet or direct connections to flexibly interface with Pro AV environment.

Public service broadcasters - which have the best resources to deploy cloud in the region – are increasingly concerned about cyber security and cloud security, as open standards and modular architectures are becoming a priority in the region.

> *"NHK is trying to push towards an all-cloud system. For example, they record all the TV shows and programs in one cloud and EPG [Electronic Programming Guide], so everything is in one cloud. But there is a plan of this, but the reality is that it's going to take another 3-5 years to actually realize it, because as a public service, the security issue in using cloud is a very difficult question."*
>
> **Major sports league**
> Asia-Pacific

Sources: IAMT, apb-news.com

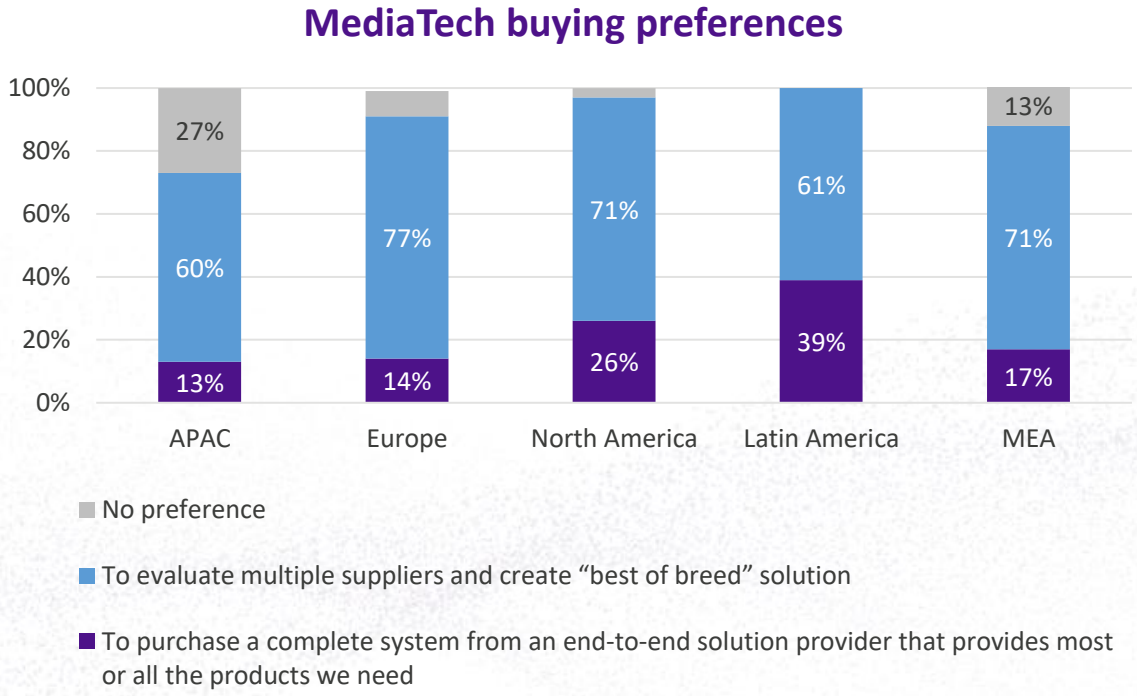
Asia Pacific – Technology Investment

Best of breed solutions are enabling flexibility, interoperability and collaborations

Asian technology buyers remain price sensitive, making them more neutral in terms of their buying preferences – 27% of respondents said they have “No preference” between best of breed and end-to-end solutions. However, demand for live production is accelerating the shift towards generic IT and commercial off-the-shelf (COTS) solutions among tier one broadcasters whose cost pressures require that their devices must be doing “anything at anytime”. In the mid-term, a hybrid use of COTS hardware using generic GPUs and reprogrammable FPGAs (Field-Programmable Gate Arrays), is enabling media businesses to innovate faster when they can update, upgrade and change their hardware functionality in the field, if needed.

The steady increase of best of breed products and decreasing level of customization is enabling the convergence of operations within broadcast and ProAV markets. Broadcasters want to avoid having a “walled garden approach” to software, and hence they are now trying to bridge multiple IP technologies to improve interoperability, flexibility and reliable transport over less predictable networks and in Pro AV environments. Moreover, many media companies in the region are having difficulties in finding technical support for their bespoke hardware if something goes wrong, making them more prone to avoid customized solutions.

The acceleration of co-productions and cross-border creative alliances between Asian media businesses highlight the importance of consistency across infrastructure, software-driven workflows and support, making end-users increasingly rely on managed ecosystems and services, which allow them to test and innovate in a cost-effective manner without exposing their organization to operational risks in a more complex environment.



Sources: IAMT, apb-news.com

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Sports rights are in a constant inflation. Broadcast production costs are also increasing. It's so expensive to broadcast a football match now. We are talking about $15-20k per match. […] At the same time, the new generation doesn't want to subscribe. They only want to consume highlights on social media.

Martin Rubino
Programming Vice Chief
TyC Sports Argentina

Latin America

Regional MediaTech Trends

theiamt.org/biu

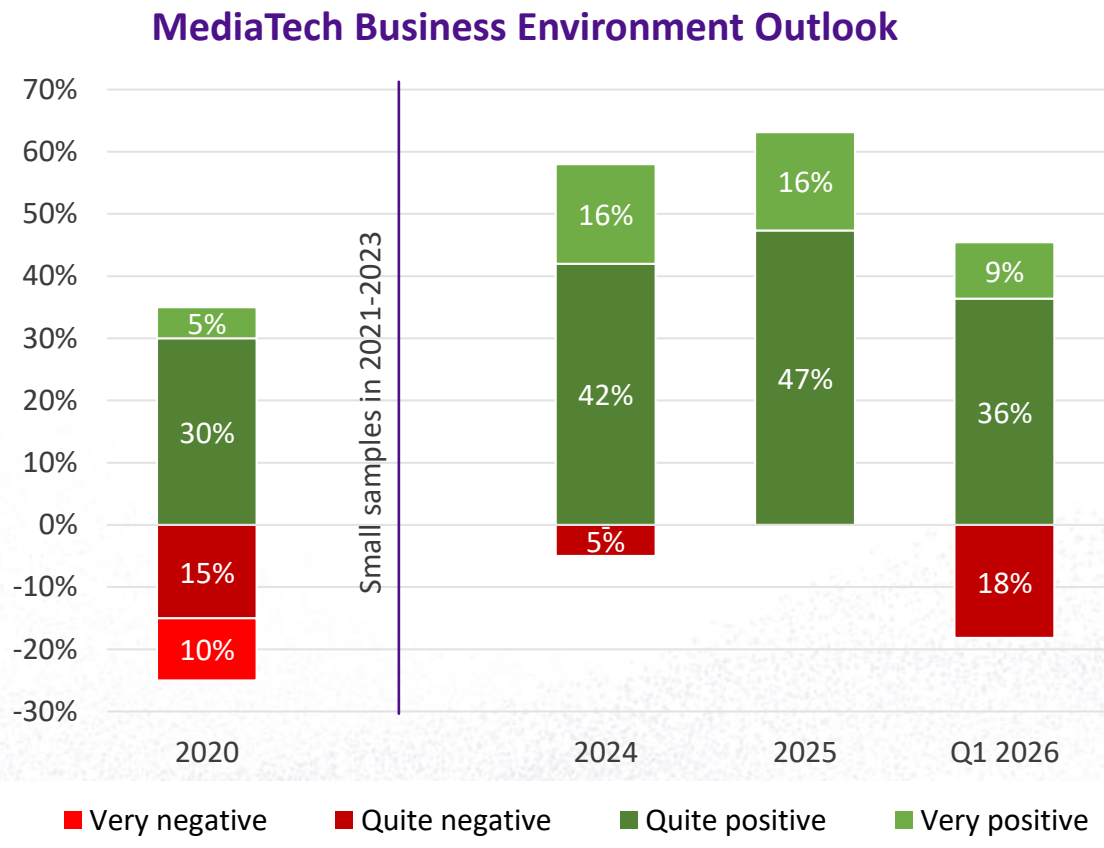
Latin America – Business Environment

FTA broadcasting remains strong despite macroeconomic pressures and the OTT boom

Business environment outlook deteriorated in Latin America due to increasing macroeconomic pressures and the growing dominance of OTT and social media platforms. The proliferation of creator-led social media platforms is absorbing digital advertising revenues, making it difficult for broadcasters to attract younger audiences and smaller advertisers on their own digital platforms. However, even though broadcasters' linear revenues continue to decline, free to air television continues to hold a stable position in the region thanks to major broadcasters' significant investments in premium sports and various content genres from short telenovelas and micro-dramas to high-quality co-productions with European broadcasters.

Live sports – including the up-coming 2026 FIFA World Cup in Mexico, Canada and the US – is accelerating broadcasters' move towards software-defined workflows, enabling remote production. Major broadcasters like Globo in Brazil and the Mexican Claro Sports and TelevisaUnivision as well as regional sports Pay-TV services like TyC Argentina, SporTV Brazil and Win Sports Colombia are key players in the live sports market, driving investment in IP, hybrid cloud, remote and virtual production. ESPN Latin America and Disney+ have strengthened their position in the region after the acquisition of Fox Sports.

The move to the next generation TV standard – Brazil TV 3.0 – is a major transformation affecting the whole Latin American market, as other countries are observing closely how the Brazil TV 3.0 will improve addressability, personalization and engagement opportunities, helping Brazilian broadcasters to compete with OTT services and attract new advertisers.



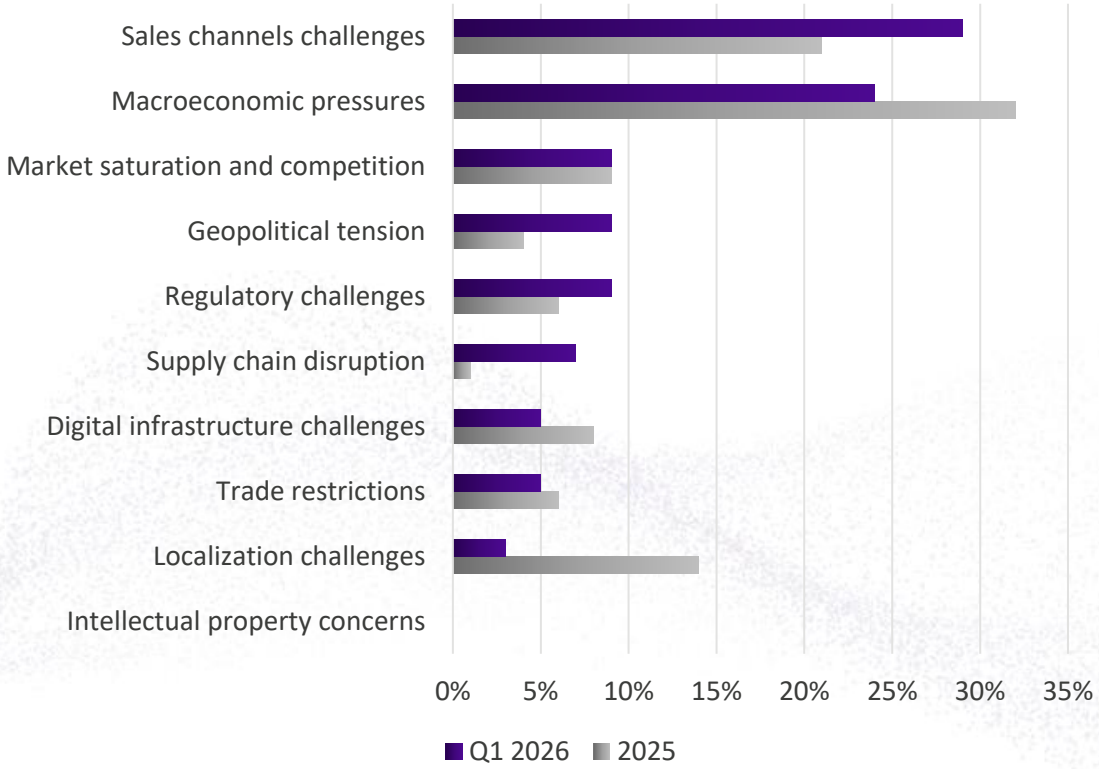
Q. What is your organization's outlook for the overall business environment over the next year? (All industry, Latin America)

Source: IAMT MediaTech Industry Tracker

Latin America – Business Environment

Sales channels challenges and macroeconomic pressures are slowing down growth

Regional barriers to growth in Latin America



Q. What is the major regional barrier to the growth of your business in each of the regions where your company operates? (All industry, Latin America 2025 n=101, Q1 2026 n=58)

Economic uncertainty is increasing due to global geopolitical tensions and on-going wars in Iran and Ukraine, causing supply chain disruptions and inflationary pressures. The impact of high energy prices is posing an asymmetric risk in Latin America as some oil-exporting countries like Mexico are benefiting from the surge in global energy prices whereas governments in oil-importing countries are having to introduce energy subsidies to support households with low income. Broadcasters are being affected by the growing inflation risks, decreasing their confidence to invest in new technology.

Media companies are challenged by growing competition from streaming services, social media platforms as well as the creator economy. Broadcasters are addressing this by producing more local platform-specific content and investing in live experiences on social platforms. For example, Globo recently launched a sports channel called GTV on YouTube to attract younger audiences, while it also has Channel Sports on Amazon Prime to diversify revenue streams across multiple platforms. Also, the launches of FAST channels and content bundling aim to expand broadcasters' audience reach.

Broadcasters – seeing their linear ad revenues to decline at a stable rate – are increasingly challenged by the proliferation of influencer marketing, affecting the way brands and advertisers want to advertise their products, fragmenting the attention of audiences and shifting focus to social media platforms.

Source: IAMT MediaTech Industry Tracker

Latin America – Business Environment

Linear TV has a strong hold of live sports market, challenged by streaming platforms

Live sports – especially soccer – continues to be a strong driver of both linear TV viewership and streaming subscriptions in Latin America. Traditional broadcasters such as Globo in Brazil and Televisa in Mexico have managed to retain control of major sports rights, and their free to air television remains the most important distribution channel for live sports in these markets due to low consumer income and poverty, preventing people from subscribing to Pay-TV or streaming services. A major broadcaster in the region told us that despite the "hype" around streaming the reality in Brazil is that less than 10% of the country's population – 210 million – have access to streaming services. Brazilian telecom operators are also mandated to carry linear broadcasters' signals for households in remote areas, which do not have access to free to air television, enabling linear broadcasters to have a very high penetration in the country and legitimizing investments in premium sports rights.

Improving internet connectivity, carrier billing, and declining mobile data costs are translating into launches of cheap mobile-only streaming offerings in Latin America. Telecom operators are also forming partnerships with broadcasters to provide virtual program distribution services (MVPDs), enabling Internet subscribers to access broadcasters' streaming apps and Pay-TV channels through their data packages.

Global streaming services are expanding their presence too. In 2025, Fox acquired Mexican sports streaming platform Caliente TV ahead of the launch of Fox One, expanding its sports rights portfolio with the CONCACAF, the UEFA and the Premier League in Latin America. Netflix secured exclusive streaming rights for CONCACAF tournaments in Mexico starting in 2027, putting Mexican national team competitions behind a foreign streaming paywall for the first time ever.

Sport	League/Competition	Rights Type	Acquirer	Announcement Year	Primary Driver
Football	CONCACAF (Nations League & Gold Cup)	Digital Streaming (Exclusive in Mexico)	Netflix	2026	Subscriber engagement
Multi-Sport	Tigo Sports Central America	Broadcast / Digital	Fox Corp	2026	Regional market expansion
Basketball	Liga Nacional de Basquete (LNB)	Audiovisual / Betting Data	Sportradar	2026	Sports betting integration
Football	FIFA World Cup 2026 / 2030	Broadcast / Digital (Mexico)	TelevisaUnivision	2025	DTC streaming growth (ViX)

Sources: IAMT, Company Filings

Latin America – Business Environment

Influencer-led free-to-access OTT sports streaming is growing rapidly

Social media platforms play an increasingly important role in live sports in the region. Influencer-led platforms such as NWB and CazeTV – a Brazilian streaming platform created by a Brazilian influencer Casimiro in partnership with LiveMode – have recently acquired rights of premium and local sports leagues, reflecting the growing momentum of free-to-access OTT platforms dedicated to live sports. For example, a YouTube channel called Futbol Digital – streaming games from South America, the Premier League and La Liga – has quickly become one of the biggest digital platforms in Argentina with over 2 million subscribers. In January 2026, a new streaming platform called KICK confirmed a rights deal to air Brasileirao matches in Latin America.

Ahead of the 2026 FIFA World Cup, major Latin American broadcasters have announced extensive coverage of matches on their streaming platforms as well as social media. For example, the Mexican TelevisaUnivision will make all matches available on its own streaming platform ViX launched in 2022. In Brazil, Globo has entered a partnership with CazeTV to expand the coverage from Globo's 52 matches shown free to air to all matches, which will be streamed on CazeTV and its social media platforms on YouTube and Twitch. This dual-broadcaster model allows FIFA – the seller of the rights – to maximize reach across age demographics, while the collaboration with influencer-led streaming services is helping Globo to build interactive engagement with younger audiences and monetize its non-live content on social media platforms.

> *"The new generation wants to watch and participate in a broadcast. They are discussing, chatting, making jokes and all of that is happening because they are like Casimiro [the influencer]. Although they don't know him personally, he is their friend, not an expert voice talking down to them. The audience and Casimiro watch together."*

Edgar Diniz, Founding Partner of LiveMode
Latin America

Sources: IAMT, WSC Sports, SportsPro, CazeTV

Latin America – Technology Investment

The adoption of Brazil TV 3.0 (DTV+) is bringing dynamic ads to linear FTA television

In 2025, Brazil officially adopted the next generation television standard, TV 3.0 (DTV+), driving a major transformation among the Brazilian free to air broadcasters, piloting the technology ahead of a nationwide rollout scheduled for the summer 2026.

In Q1 2026, Brazil announced that it had completed the nationwide switch-off of analogue free-to-air television, ending its 16-year migration to digital broadcasting and freeing up spectrum for mobile broadband such as 4G mobile internet coverage in rural areas. Simultaneously, the Brazilian government announced that it will extend the deployment deadline for the new TV 3.0 platform to the end of 2027 to give broadcasters and technology partners more time to finalize technical standardization, on-going trials and device development.

Built on the ATSC 3.0-derived technologies, the Brazilian TV 3.0 platform combines traditional broadcast delivery with broadband connectivity, enabling dynamic ad insertion (DAI), personalization, immersive formats and interactive applications. Acknowledging Brazil's dependence on satellite distribution due to the country's vast geography, TV 3.0 enables hybrid over-the-air (OTA) broadcast/IP synchronization and addressable advertising through regionalized targeting. This allows satellite broadcasters to localize ad campaigns and directly compete with digital platforms.

Globo – having been the key promoter and developer of the IP-based TV 3.0 platform – has tested the technology in low-power TV 3.0 pilot stations in Rio de Janeiro and Sao Paulo since 2025 and now it is preparing to launch high-power 3.0 stations in several Brazilian cities by early summer to broadcast 4K HDR coverage of the 2026 FIFA World Cup. Globo's new high-power stations will deploy MIMO [Multiple Input-Multiple Output] transmission technology, which eliminates the need for an external antenna – this is critically important for Brazilian broadcasters to ensure the ease of adoption for consumers. Globo's investment in new high-power stations is driving demand for transmitters and antennas, creating new business opportunities for traditional radio frequency (RF) vendors whose sales have stagnated in the US due to the slow adoption of the ATSC 3.0 standard.

Globo and other Brazilian broadcasters have announced plans to use TV 3.0 to combine over the air (OTA) and OTT delivery so that all live programming will be delivered as OTA, whereas interactive feeds from multi-camera, VOD content, targeted ads and e-commerce will be delivered as OTT via broadband. This will enable broadcasters to reach new audiences across platforms, measure their performance and engage with viewers in a personalized, yet cost-efficient way through a mix of multicast and unicast.

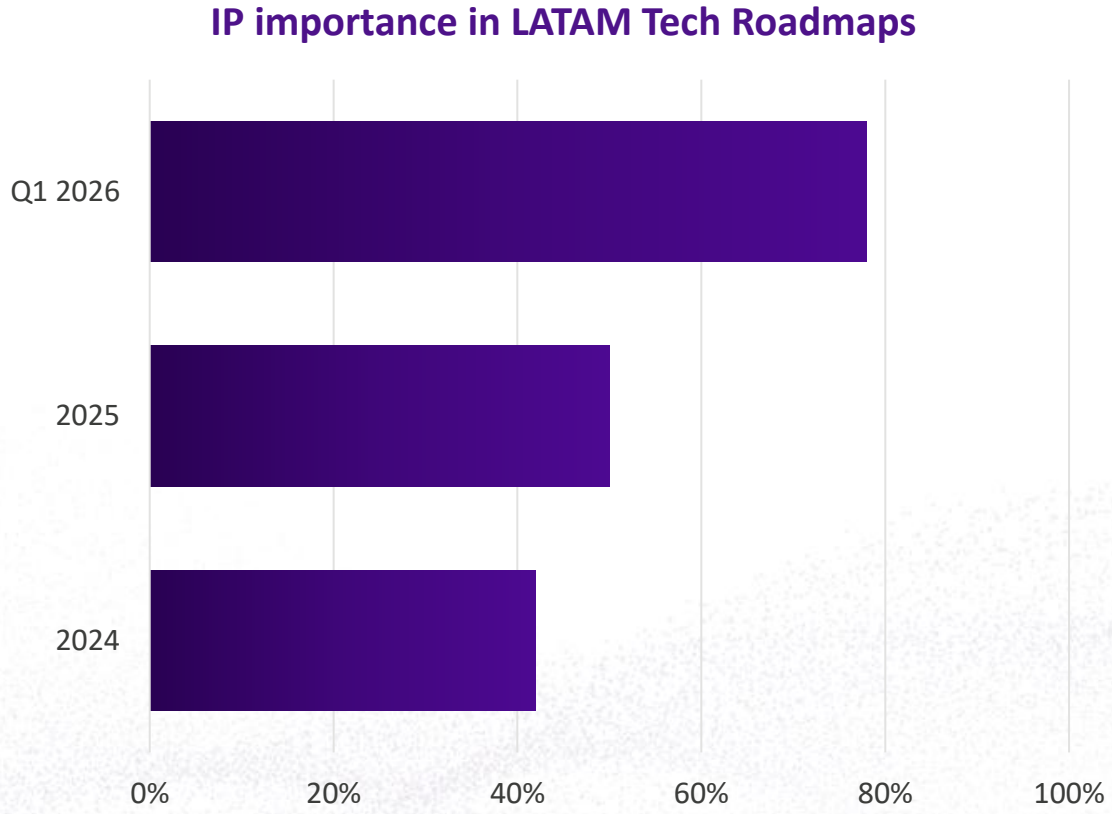
Sources: IAMT, SBTVD Forum, csimagazine.com

Latin America – Technology Investment

The adoption of IP is enabling advancements in remote and virtual production

While hybrid SDI/IP environments remain common in the region, major Latin American broadcasters are moving to full IP-based workflows and hybrid cloud models. In Q1 2026, Globo announced that it had completed the transition of its primary content delivery to a fully IP-based infrastructure, using the SRT protocol. By moving its primary distribution to an IP backbone, the broadcaster said it can move away from the expensive and rigid traditional satellite uplinks and dedicated fiber circuits and instead it can use a more flexible, agile and cost-effective IP network to deliver broadcast-grade content to multiple platforms, accelerating its time-to-market for new content and related monetization. TelevisaUnivision started its transition to IP in 2024, and is expects to complete the initiative by 2029.

Induced by the COVID-19 pandemic, major rights holders and broadcasters continue to move away from the traditional way of producing live sports to remote production in their efforts to do more with less. For example, at the Paris 2024 Olympics, Globo created a remote virtual production studio in the middle of the Eiffel Tower – which was later recognized by the International Olympic Committee with an award as the most innovative studio in the Olympic Games – enabling the broadcaster to reduce its on-site team in Paris from 800 people to 40 engineers. Globo plans to use the same model for the up-coming FIFA World Cup.

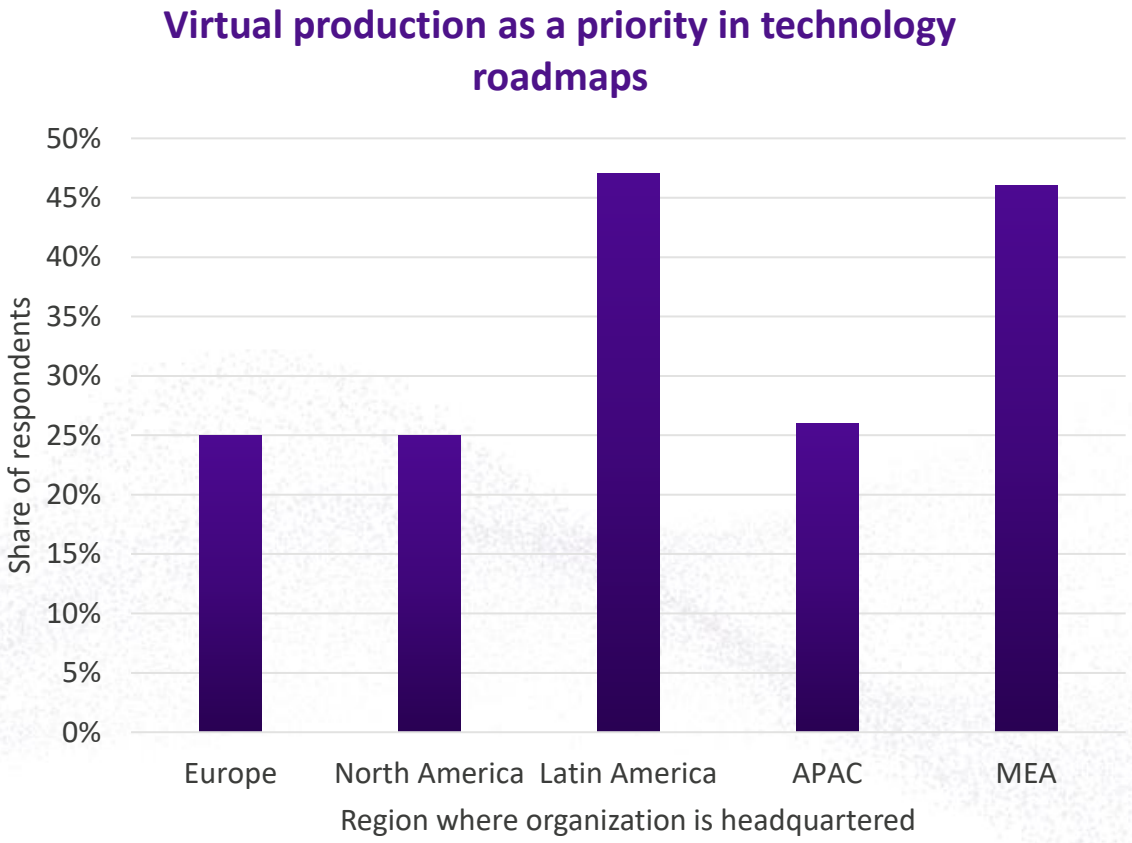


Q. What are the most important trends in your organization's technology roadmap? (All industry, Latin America, n=9 to 19)

Sources: IAMT, Company Filings, OBS

Latin America – Technology Investment

Latin America is investing in virtual production, enabling augmented creativity at low cost



Q. What are the most important trends in your organization's technology roadmap? (All industry, past 12 months, n=17 to 129)

> *We have a virtual studio, where we re-created Antarctica environment, the landscape and a research base there [for a movie]. We didn't travel there. We made it fully AI-powered. AI speeds up production, lowers the cost and gives many options.*

Commercial Broadcaster
Latin America

Source: IAMT MediaTech Industry Tracker

Latin America – Technology Investment

Hybrid cloud is providing efficiency, but cloud costs and sovereignty raise concerns

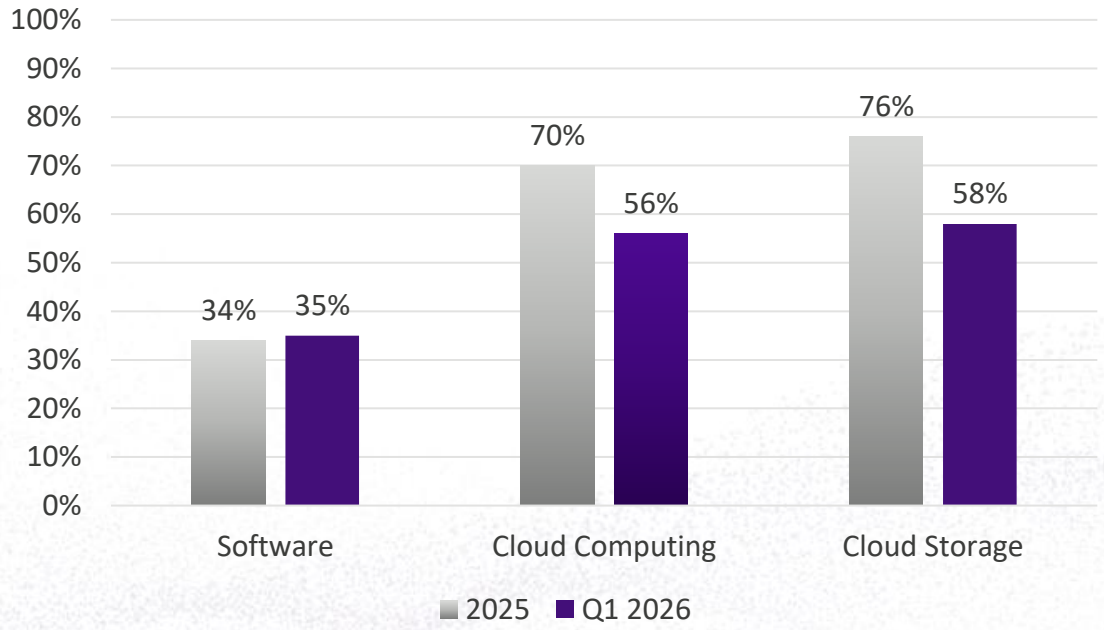
The global investment outlook for media production companies' change in spend on both cloud compute and cloud storage decreased in Q1 2026 compared to 2025, reflecting high cloud costs and rising concerns over digital sovereignty. In Latin America, some broadcasters told us that they are investing in hybrid cloud, expressing an increasing interest in private cloud setups due to growing concerns related to data sovereignty and high cost of public cloud services.

Bigger broadcasters are testing hybrid cloud production to do more with the same resources and to scale dynamically during traffic peaks in live production. For example, one major broadcaster in the region said that by replacing their existing installed base of nearly 50 control rooms with cloud-based production, they expect to reach significant cost savings and an improved total cost of ownership, as their existing control rooms – each valued at about $5m – are each used for only a few hours per day.

Demand for cloud-based media asset management solutions is growing, as broadcasters aim to produce more near-live sports content to improve viewer engagement and to leverage different AI tools. Major broadcasters in the region are gradually moving away from monolithic media asset management (MAM) solutions toward more "lightweight" and modular solutions, citing the vendors' lack of vision and their slowness to respond to broadcasters' new technical requirements as an issue. Hence, they are looking to have one single cloud-based asset backbone to leverage a single archive across their entire operations to drive efficiency through deduplication of storage.

Media companies' investment outlook – Global

NET outlook (will increase minus will decline)



Q. What is your outlook for your organization's investment in the following categories of products/services over the next year? (media/production companies, sample size - from 16 to 64)

Source: IAMT MediaTech Industry Tracker

Latin America – Technology Investment

AI is emerging in content production and ad tech, generating ads and short videos

Media businesses in the region are exploring and adopting AI throughout their media supply chains. The three most important areas of deployment are content production, personalized user experience (UX) and advertising technology to improve the journey of small and medium-sized advertisers generating creative ads and videos with AI tools. Automated metadata tagging and cloud-based media asset management tools play a crucial role in enabling AI deployments in these areas.

In newsrooms, Generative AI is already being used to search for historical information to provide context for current reporting, deepening coverage while reducing the content's time to market when more-time consuming tasks such as summarization and transcriptions can be automated. News organizations in Latin America are trying to find the right balance between automating content production to multiple platforms while maintaining audience trust.

In live sports, AI is enabling broadcasters to use fewer cameras and smaller crews as the feeds can be analyzed by computer vision and can be automatically generated by using AI. In studio productions, some media businesses in the region told us that they are using AI to simulate hard to reach environments, dangerous conditions or characters that would be difficult to film in person due to data privacy and legal restrictions (e.g. small children). This is significantly reducing the content's time to market.

> *We are using AI for the creation of artistic clips and teasers to promote important matches that we will broadcast. In the future, we need to adopt all the AI services that can help us, because this new world is so competitive and you need to have the best tools to process information quickly and solve problems to grow and to survive.*

Pay-TV Operator
Latin America

Sources: IAMT, World Association of News Publishers

Latin America – Technology Investment

Hyperscaler investments are translating into new regulations amid sovereignty concerns

Media businesses are increasingly concerned about data provenance and digital sovereignty, as the region is going through an unprecedented transformation of its connectivity map, as telecom operators continue to invest in 5G networks. Despite massive hyperscaler investments in Mexico and Brazil, investment in local computing capacity remains modest and national governments lack unity in terms of legislation regarding data privacy, environmental laws and sustainable investment policies.

Brazil is the largest data center market in the region with over 1 GW of installed capacity with a projected increase of nearly 60% by 2030, driven by the country's extensive hydroelectric resources and recently introduced tax incentives to accelerate hyperscalers' investment. In 2025, the Brazilian government announced REDATA regime – a special taxation regime for data centers – and PNDC (National Data Center Development Program) to make the regulatory environment simpler and to offer tax incentives and guidelines for foreign investors, raising concerns about potential consequences to digital sovereignty and increasing dependence on North American public cloud services.

In Mexico, the government has attracted hyperscaler projects in Queretaro – accounting for nearly 70% of the country's installed capacity – which provides a strategic location linking North and Latin America with robust US connectivity, low operational costs and renewable energy sources. As a result, Mexico's installed capacity is projected to reach 480 MW by 2029. In contrast, authorities in Chile have taken a more restrictive approach, reversing approval of Google's data center project worth $200mn planned in central Santiago. In late 2024, Google announced that it had taken the project "back to square one" to redesign the data center with air cooling to reduce its environmental impact.

The lack of collaboration and unity between Latin American governments in their approach to digital sovereignty is leaving broadcasters to resolve potential risks themselves, driving demand for hybrid cloud infrastructure and secure, sovereign cloud expertise.

Sources: IAMT, cushmanwakefield.com

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“The data center investments are the main driver. They [big tech firms] are offering financial incentives for the key broadcasters to come and move infrastructure at very low prices, and for government entities it’s free.”

Ali Husseini, Managing Partner & CTO at Reson8 Media, The Middle East

Middle East & Africa

Regional MediaTech Trends

theiamt.org/biu

Middle East & Africa – Business Environment

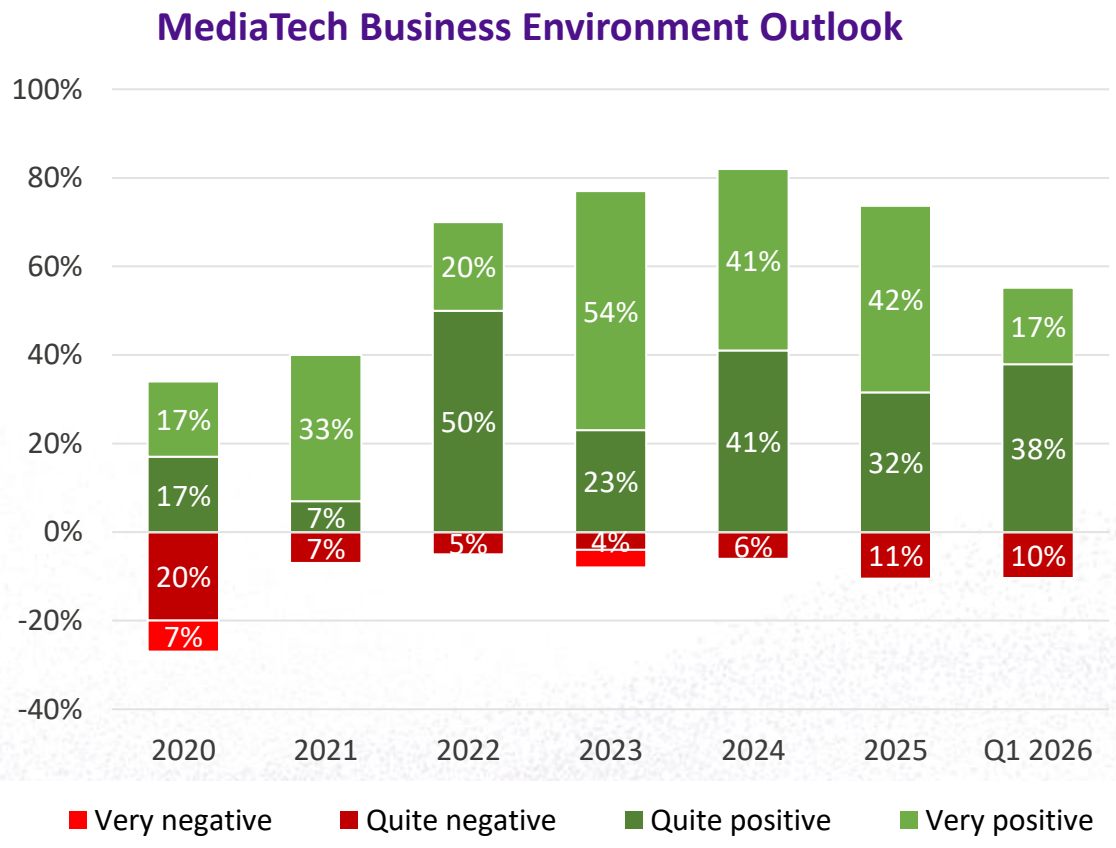
Business sentiment remains relatively positive, but the war in Iran is risking growth

Government-led investment programs and subsidies for new data centers and AI firms have led to a data center boom in the Gulf countries. In 2025, numerous big tech firms announced data center projects in Qatar, Saudi Arabia, Bahrain and the UAE, attracting local broadcasters and streaming services through financial incentives to move their infrastructure to the new facilities.

In Q1 2026, the business environment outlook deteriorated significantly due to the war in Iran, which caused an unprecedented shock in global energy prices and disruptions in supply chains. Drone attacks against data centers in the Gulf region – causing severe outages – highlighted vulnerabilities in the physical security of digital infrastructure as well as risks related to organizations' growing operational dependence on cloud compute and connectivity. As the Gulf countries advance in their national digitalization programs (e.g. Saudi Vision 2030), addressing these challenges through the deployment of multi-region resilience and disaster recovery is critical.

Hyperscalers and local stakeholders are expected to invest in counter-drone and missile defenses to protect existing data centers in the region. Increasing insurance premiums for Gulf data centers are expected to slow down technology investment growth in the region and potentially result in the relocation of some planned data centers to other territories. However, media companies in the Gulf countries – being well resourced by national governments – continue to have stable budgets, translating into a relatively positive business outlook.

In Sub-Saharan Africa, macroeconomic pressures and the lack of electricity are negatively affecting the business environment outlook.



Q. What is your organization's outlook for the overall business environment over the next year? (All industry, Middle East & Africa)

Sources: IAMT MediaTech Industry Tracker, CNBC

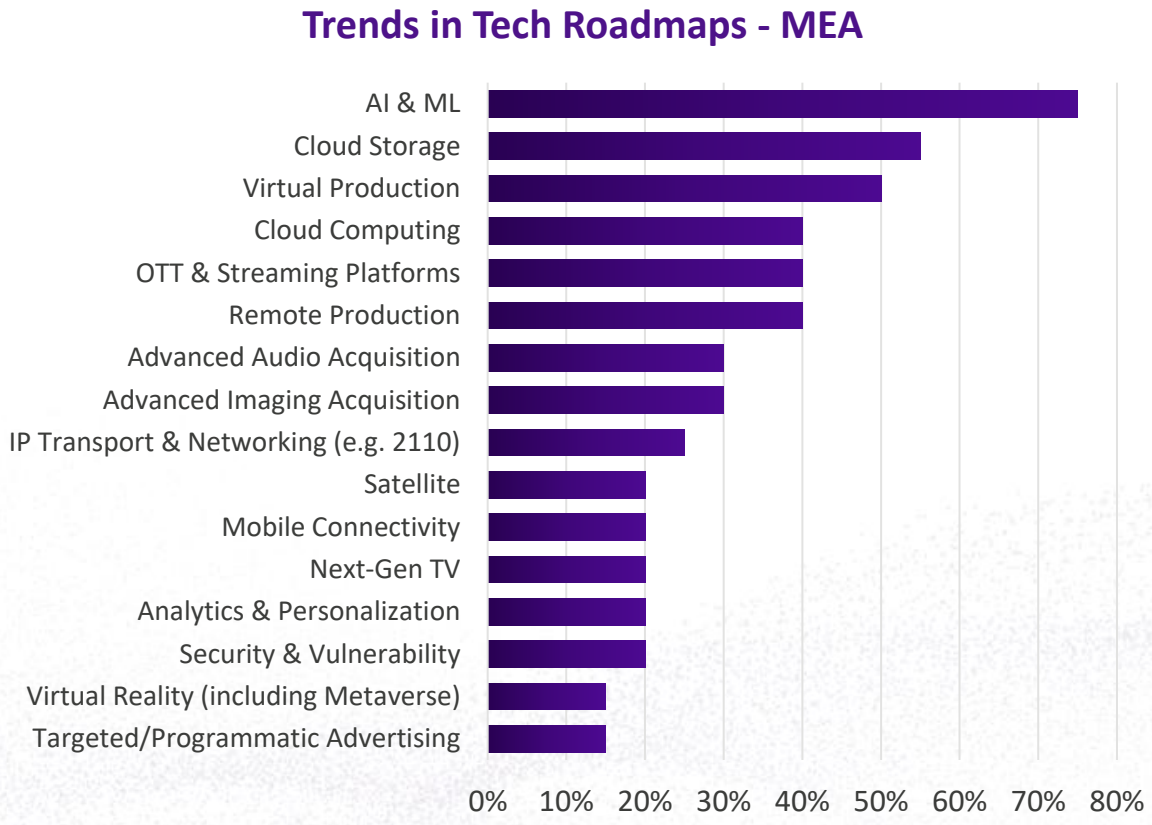
Middle East & Africa – Technology Investment

The importance of AI in tech roadmaps is driven by the need for operational efficiency

AI&ML remains the most important trend in MediaTech vendors and buyers' technology roadmaps in the Middle East, driven by the need for operational efficiency. AI-based tools across the media supply chain are helping broadcasters to compete with international and local streaming services through automation, improved monetization and hyper-personalization.

Broadcasters in the region are increasingly investing in AI-based media asset management and metadata tagging, improving content discovery and re-monetization of their archives. For example, in 2025, MBC Group announced that its streaming platform, Shahid, had implemented Mediagenix On-Demand suite for multiplatform audience engagement and AI-driven scheduling automation. Reportedly, the implementation of AI recommendation engines has increased average view time per session by 35%. Starzplay, the leading local SVOD platform focusing on premium entertainment and sports, implemented BytePlus' AI-powered content recognition technology to introduce micro dramas, in-app detection and generate shoppable content for vertical scrolling experiences. Combined with Starzplay's own AI personalization engine, BytePlus' AI tool aims to deliver a more interactive and personalized user experience.

The adoption of cloud is a prerequisite for the wide-scale adoption of AI in media companies, directing investment in cloud storage to accommodate growing volumes of data and AI processing.



Q. What are the most important trends in your organization's technology roadmap? (All industry, Europe, Q1 2026 n=20)

Sources: IAMT MediaTech Industry Tracker, Company Filings

Middle East – Business Environment

Rising geopolitical tensions and sales channels challenges are a key concern

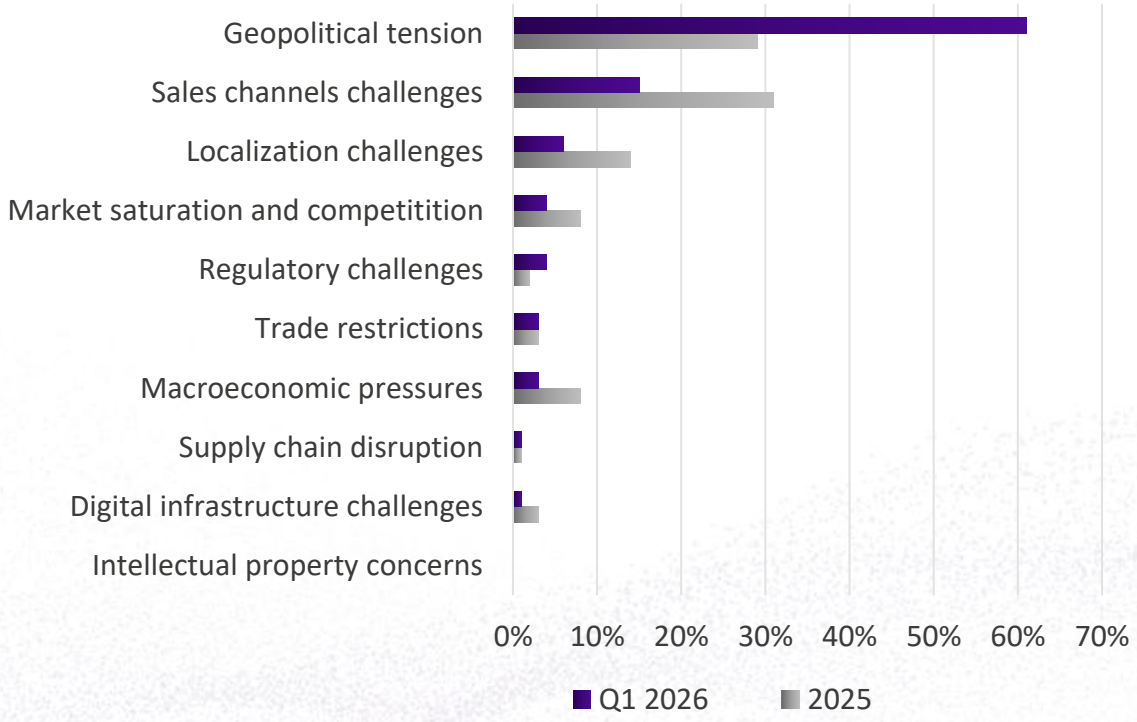
Military conflicts highlight the importance of resilience and security. Recent military attacks across the Middle East, damaging data center infrastructure and causing disruptions in mobile banking, payment apps and consumer services, have highlighted the fragility of cloud dependency under modern military conflicts. Energy volatility is also posing new risks to the region's digital transformation.

Major broadcasters – still largely relying on satellite and 12G-SDI infrastructure – are finding their existing technology resilient and secure, while they gradually explore hybrid SDI/IP solutions.

Resources exist, but broadcasters lack clarity on ROI and support. Broadcasters in the Gulf countries have significant financial resources to invest in new technologies, but they remain conservative in adopting IP and cloud due to the uncertainty related to long-term costs of solutions with an OpEx model. Major broadcasters' finance departments – making investment decisions – need concrete cost estimates of suggested tech roadmaps as well as long-term guidance, support and collaboration with vendors to assess requirements and long-term benefits of IP and cloud to them.

Local tech buyers told us that they are reluctant to invest in new technology, if different vendors are having conflicting selling points and lack the understanding of region-specific limitations to adopt new technologies. Broadcasters also lack the right skillsets to move to software-driven workflows, slowing down adoption.

Regional barriers to growth in the Middle East



Q. What is the major regional barrier to the growth of your business in each of the regions where your company operates? (All industry, Middle East 2025 n=96, Q1 2026 n=67)

Source: IAMT

Middle East – Business Environment

Collaboration and partnerships are helping broadcasters compete and transform

Broadcasters in the Middle East are shifting their focus from building independent OTT platforms to collaborations with major streaming services to expand audience reach, re-monetize their existing content and improve viewer engagement on the same platform. Increasingly relying on content partnerships with established streaming services, broadcasters can allocate more resources to local original productions and improve the share between advertising and subscription revenues. For example, in Q3 2025, MBC Group announced a partnership with Netflix, bundling Netflix's content with MBC Group's streaming service, Shahid, and its linear TV channels under one single subscription. In Q4 2025, Abu Dhabi Media (ADM) entered a strategic partnership with Starzplay, making over 5,000 hours of premium Arabic entertainment and sports exclusively available on Starzplay's ad-supported streaming plan. Major streaming services are also investing in live sports. MBC Shahid bought rights for Bundesliga, Coppa Italia and Copa del Rey, while Starzplay renewed exclusive rights for Serie A and Professional Fighters League (PFL).

In February 2026, Al Jazeera debuted its first Arabic-language FAST channel on Samsung TV Plus aiming to expand its audience reach and streaming offering. The FAST service follows Al Jazeera's launch of its free, ad-supported OTT platform – Al Jazeera 360 – in late 2024, focusing on Arabic investigative journalism, documentaries and archive content.

Major news organizations like Al Jazeera have recently launched AI initiatives and entered partnerships with major cloud service providers, making their adoption of generative and agentic AI in news production public to maintain audience trust. In December 2025, Al Jazeera Media Network announced its flagship AI initiative, "The Core", together with Google Cloud, which aims at transforming Al Jazeera's news operations by integrating Google's Gen AI and agentic capabilities to empower journalists to focus on high-value storytelling, while leaving operational tasks and complex data processing to Google's AI agents.

> *"We're thrilled to have MBC Group join forces with Netflix to bring its content to our audiences under the convenience of a single subscription."*

Mohammad Al Kuraishi, Head of Business Development & Partnerships for Middle East & Africa, Netflix
Middle East

Sources: IAMT, Company Filings, Al Jazeera, variety.com

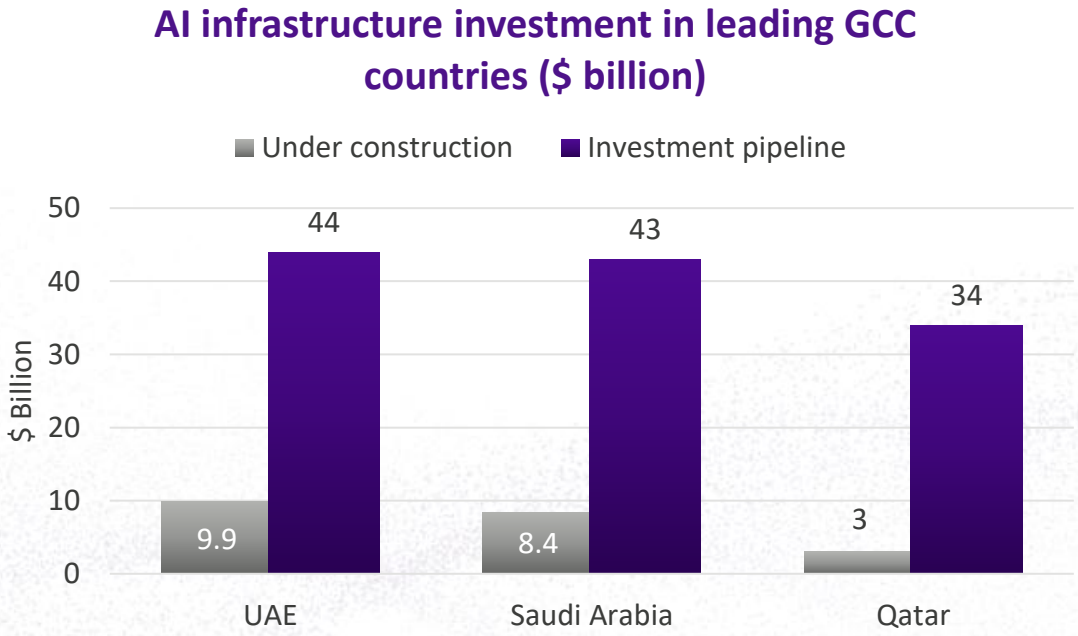
Middle East – Business Environment

Significant investments in AI infrastructure are democratizing access to AI

Public-private partnerships will scale local AI infrastructure in the Middle East. Between 2023 and 2025, the Gulf Cooperation Council (GCC) countries attracted over $40b in confirmed hyperscaler commitments. Microsoft has the largest regional commitments at $17.3b, followed by AWS ($16.3b), Google Cloud and Oracle ($1.5b). Hyperscaler investments are backed by sovereign wealth funds such as Saudi Arabia's Public Investment Fund (PIF), the UAE's Mubadala and Qatar's QIA, which fuel the Gulf governments' digital transformation strategies: the Saudi Vision 2030, the UAE National AI Strategy and Qatar National Vision 2030. Major telecom operators like stc (KSA), Ooredoo (UAE) and Batelco (Bahrain) are also investing in data centers to improve connectivity.

The so called "AI superclusters" are located in the UAE and Saudi Arabia, which combined account for over 75% of the region's current data center rack capacity. The flagship projects include the first phase of G42 Stargate AI campus– worth $40bn – which is the largest data center campus outside the US, developed by Nvidia, OpenAI, Cisco, SoftBank and Oracle. When finalized, the AI campus will contribute 200 MW by mid-2026. The full Stargate 5 GW master plan remains in the pipeline. Saudi Arabia's flagship AI project, HUMAIN will add 1.9 GW to the country's compute capacity by 2030 and 6.6 GW by 2034, making it the world's third-largest AI hub. Saudi Arabia also announced that it will double its data center capacity from the current 300 MW (21 facilities) to 650 MW (36 facilities) by 2028.

The magnitude of these investments highlight the urgency of de-escalating the on-going war in Iran and building up physical security systems around data centers. For broadcasters, access to low-cost cloud compute and AI resources means lower risks to test new technologies.



Sources: IAMT, Emirates NBD Bank, Qatar Investment Authority

Middle East – Technology Investment

Move to IP and cloud is picking up, but broadcasters lack clarity on OpEx models

Broadcasters' priorities are shifting towards digital platforms, while linear systems such as baseband, SDI and satellite are kept operational to reach remote areas with limited connectivity. In the Gulf countries, all major broadcasters like Al Jazeera and the MBC Group are government-funded and hence they have strict compliance requirements regarding data protection and data sovereignty, forcing them to keep operations on premises.

While broadcasters are investing in OTT and streaming platforms, they are aware of the region-specific infrastructure limitations. For example, as of Q1 2026, there were only two full IP channels in operation in the Middle East, limiting the adoption of IP-based workflows. The main challenge, however, is the conservative decision-making culture in broadcast organizations in the region, favoring CapEx-based investments though fixed budgeting cycles. Broadcasters are also lacking experience and clarity on the benefits of OpEx models, and they expect more vendor support.

Satellite and telecom operators are also moving to software-defined, virtualized networks. In satellite and telecom stacks, IP-based networking is now standard as operators virtualize network functions and adopt standards-based orchestration in order to manage multi-orbit complexity.

Satellite operators are partnering with major cloud service providers to enable secure connectivity from remote areas to data centers. Cloud service providers are increasingly co-locating satellite gateways for secure point-to-point links. The move to software-defined, virtualized ground systems is enabling seamless integration between terrestrial and cloud networks. Satcom and enterprise applications are increasingly using cloud to manage growing traffic volumes due to edge computing, AI and Earth Observation (EO) data processing.

> *In GCC [Gulf Cooperation Council countries], financial resources are huge and there are a lot of ambitious projects, but broadcasters are very conservative. We know that ROI will appear in 5-10 years, but vendors don't talk about the hidden costs such as cloud hosting or the infrastructure required for the IP transformation. That's making people reluctant, especially the CFOs who only care about the ROI and how much expenditure will happen.*
>
> **MediaTech supplier**
> Middle East

Source: IAMT

Sub-Saharan Africa – Business Environment

Low budgets and unpredictable decisions are slowing down the move to digital TV

Major MediaTech buyers in the Sub-Saharan Africa consist of government-funded national broadcasters in more advanced economies with relatively stable political and societal systems such as South Africa, Ethiopia, Kenya, Nigeria and Angola. Most countries in region have started their move from analogue to digital television, and some have completed their Digital Switch-Over (DSO). However, the vast majority of TV-equipped households still watch analogue TV unless they are getting the signal from a satellite receiver, which is also common in the region.

In more advanced economies like South Africa, Ethiopia and Nigeria, the governments are investing in linear radio, upgrading TV networks and adopting new TV standards. DVB-T2 is most widely adopted standard in the region and typically paired with MPEG-4. Recently, demand for the DVB SIS (Single Illumination System) standard has increased because it can optimize digital TV delivery by using a single satellite feed for both DTH (Direct-to-Home) and Digital Terrestrial Television (DTT) distribution. In countries like Tanzania, Ethiopia and Namibia, where over half of TV-equipped households rely on satellite and terrestrial networks fall short, governments have switched to only free to air Direct-to Home (DTH) distribution.

MediaTech vendors operating in the region reported that the adoption of new TV standards is bound to political support and hence decisions over new TV standards might change unexpectedly, if the governments change after elections. This is creating uncertainty for local broadcasters implementing the standards and slowing down the adoption process. For example, Botswana decided to change from DVB-T2 to the Japanese ISDB-T standard following the change of their government.

Status of the transition to digital terrestrial television (DSO)

Sources: IAMT, ITU

Sub-Saharan Africa – Business Environment

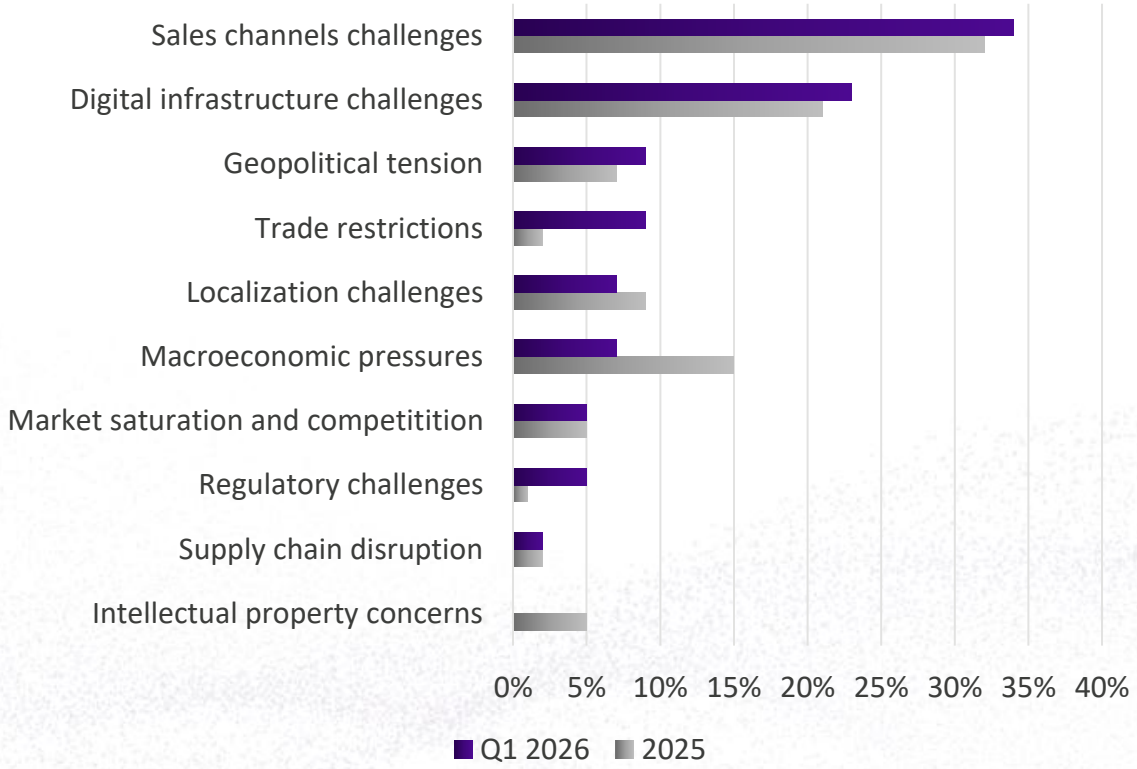
Lack of electricity is reducing incentives to upgrade technology infrastructure

The lack of electricity and significant distances between urban areas are making it challenging for national governments to commit to infrastructure upgrades and investments in new network projects, as energy supply and operational costs remain uncertain. Many countries in Sub-Saharan Africa rely on fuel imports for generators, which is a major expense for the country and hence subject to political prioritization to run more critical public services such as hospitals, government institutions and military. Even in more developed markets like Ethiopia, about 40-50% of the country's population still has no access to electricity. While solar recharging stations and solar lanterns are becoming more available and accessible in rural areas, many villages still run a television on a 12 Volt battery, reflecting the low incentives for governments to invest in new broadcast networks.

South Africa is the most mature market in terms of digital TV distribution and electricity supply, but even there the government has had to recently settle some of the debts of its major public service broadcaster to continue paying the electricity and the employees' salaries.

Nearly all content distributed over satellite is free to air, meaning that the incentives for Pay-TV services are very low to enter the market. Localization challenges stem from the lack of copyrights as well as censorship. Content restrictions between different countries are reducing content sharing. Many countries in the region apply censorship to select topics, for example Nigerian feature films that include depictions of witchcraft often have limited commercial reach outside of their domestic market.

Regional barriers to growth in Africa



Q. What is the major regional barrier to the growth of your business in each of the regions where your company operates? (All industry, Africa 2025 n=81, Q1 2026 n=44)

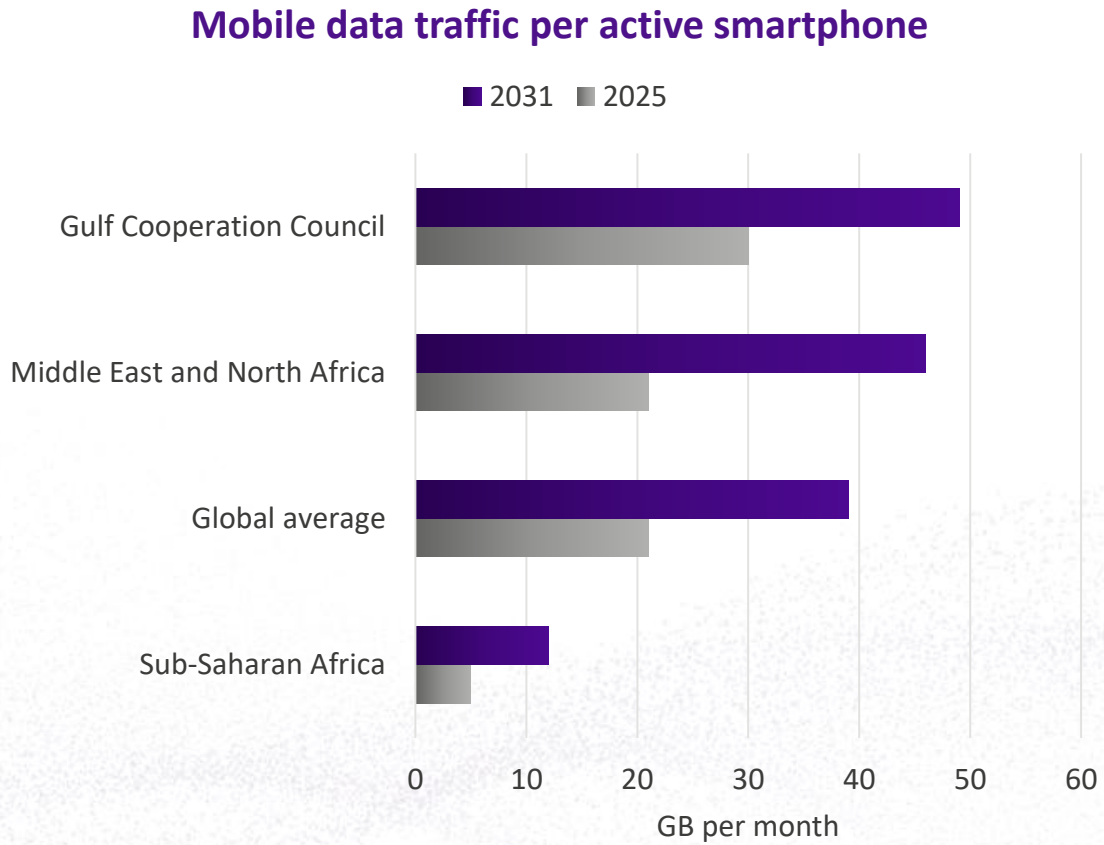
Source: IAMT

Sub-Saharan Africa – Business Environment

Satellite remains critical due to poor internet connectivity, limiting cloud adoption

Sub-Saharan Africa remains heavily dependent on Direct-to-Home (DTH) satellite distribution, as the coverage of fiber networks is very limited and internet connectivity can be unreliable and rare in TV-equipped households. Mobile network data is typically the only method to connect to the internet and subscription-based OTT services, which remain expensive due to high data rates.

The rise of fintech and mobile payments, the adoption of new technologies like 5G fixed wireless access (FWA) as well as investment in fiber-optic technology are gradually driving the penetration of fixed broadband, but the progress is slow due to infrastructure challenges and low levels of infrastructure sharing, resulting in high operational costs and low profitability. Several countries have launched initiatives such as Kenya's National Optical Fiber Backbone (NOFBI) and Ivory Coast's fiber expansion initiative target to improve nationwide connectivity. The European Investment Bank and other development banks have actively financed network modernization projects and the rollout of 5G FWA, which is emerging as a cost-effective alternative to a fiber network. Innovative models to expand the mobile broadband coverage to rural areas now include non-terrestrial networks (NTNs), Network-as-a-Service (NaaS) and LEO satellites.



Sources: IAMT, techcabal.com, BBC, Ericsson

Sub-Saharan Africa – Technology Investment

Investment in radio is growing, as high data rates remain a bottleneck for OTT

The investment environment in Sub-Saharan Africa remains challenging, as government budgets are becoming increasingly tight due to rising energy prices, driven by the on-going conflicts in the Middle East and Ukraine. This has recently forced several countries in the region to cut fuel taxes and allocate money to energy subsidies, increasing government debt, economic risks and postponing long-term investment plans. In terms of MediaTech investment, broadcasters – typically financed by government that require at least 10 years of financial support for any new project and considering them to be capital expenditure only – are struggling to get follow up budgets to invest in software updates, critical maintenance and spare parts after the network is built. MediaTech vendors operating in the region reported that due to the lack of maintenance, many relatively newly-built networks have started to slowly "fall apart" in countries like Ivory Coast and Angola. Also, vast geographical distances, a shortage of skilled personnel as well as obsolete equipment are making infrastructure upgrades and maintenance very challenging, directly reducing incentives to invest in new technology in the region.

Demand for linear radio is growing rapidly, driven by the inflow of cheap, imported Chinese mobile phones – featuring built-in FM receivers enabling consumers to listen to the radio without buying additional devices. Typically, these mobile phones are specifically customized for the African market (e.g. longer battery life). Local governments are also aiming to increase their political influence and reach by investing in radio networks. For example, the Angolan government recently invested in the expansion of radio networks to extend its coverage from the current 40% of the population to 96% before the next elections in 2027.

High mobile data costs in Sub-Saharan Africa make mobile streaming very expensive, causing a bottleneck for OTT services to grow. Moreover, many markets in Sub-Saharan Africa do not have any free FM frequencies left, fueling investment in Digital Audio Broadcasting (DAB+) radio networks, which enables multiple stations to share the same frequency and offering robust signal delivery to rural areas. For example, South Africa, Uganda, Ghana and Kenya have all launched digital radio trials deploying DAB+ between 2022 and 2026.

The majority of the population in Sub-Saharan Africa cannot afford any subscription-based services due to high data costs and hence their only affordable medium to watch television is either satellite or analogue terrestrial TV. Instead of prepaid or post-paid mobile plans, consumers typically use scratch cards in their phones, however these are not cost effective for streaming TV and films from OTT platforms. For example, in March 2026, MultiChoice – the major commercial broadcaster in South Africa and the whole region – announced that it will shut down its OTT service due to the poor connectivity and the lack of fiber network in the country.

Source: IAMT

Sub-Saharan Africa – Technology Investment

Cloud adoption is constrained by unreliable Internet connectivity

Unreliable internet connectivity in the region is a significant obstacle for local governments and broadcasters that want to adopt cloud-based workflows. In terms of compute capacity, Africa accounts for only 0.6% of the global data center and computing capacity, while the continent has about 19% of the world's population, according to National Information Technology Development Agency of Nigeria (NITDA).

In terms of investments in cloud infrastructure, major hyperscalers dominate the fragmented cloud market . Today, the combined installed capacity of the African continent's top five markets – Nigeria, Kenya, South Africa, Egypt and Morocco – remains under 500 MW, which is less that what France had in 2024 (~800 MW). In 2025, MTN Nigeria completed the first phase of its $235mn data center while Cassava Technologies launched Africa's first AI factory in South Africa. However, cloud remains unreliable for most Africans and national governments have no control over the existing cloud infrastructure, which is currently private-sector led. To use existing cloud services in the region, a broadcaster would have to go through various satellites and hubs, causing latency and high costs. Moreover, African governments are typically investing only as CapEx, making cloud-based services less attractive.

Recent damage to subsea cables caused severe outages in many African countries revealing the region's dependence on only a few cables and service providers. Rising geopolitical tensions have increased security concerns as well as induced interest in sovereign clouds.

> *"Budgets are always tight in Africa. Broadcasters are given a certain amount of money and they try to buy as much as they possibly can with it. They'll typically get an allocation for CapEx. There's no budget for OpEx, so they cannot afford SLAs [Service Level Agreement], the software upgrades or spare parts."*

Paul T. Anderson, Sales Director of Sub-Saharan Africa, GatesAir
Middle East

Sources: IAMT, NITDA

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Regional MediaTech Trends

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Featured Quotes

Note: All quotes presented in this report are derived from IAMT analyst-led interviews, unless otherwise attributed to third-party sources. Quotes are presented in the order they appear in the report.

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