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INDIA

SPECIAL EDITION



UNVEILING THE THRIVING TRAJECTORY OF THE INDIAN AV INDUSTRY

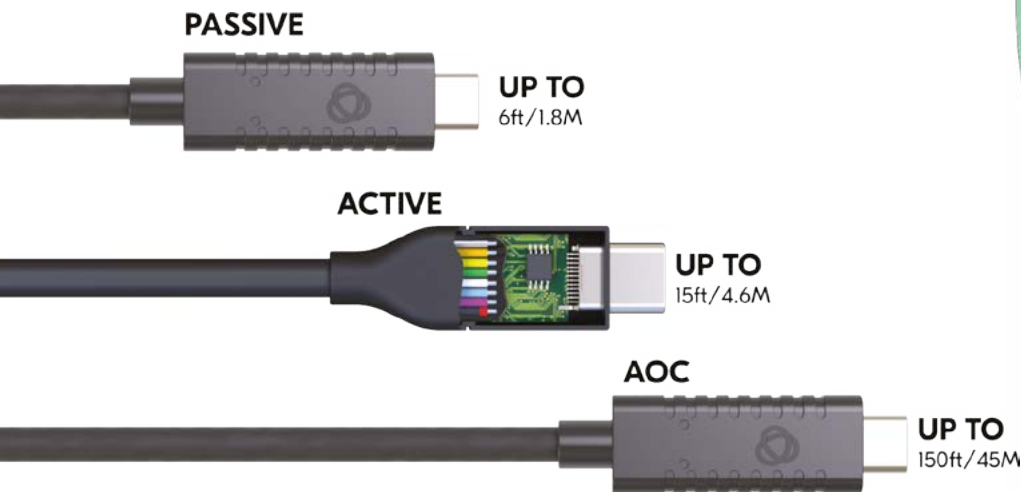
Challenges

Opportunities

Trends

Aspirations

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October 2023

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FIRST WORDS



Thomas Richard Prakasam
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The AV industry in India is on the cusp of an exciting transformation, marked by optimism and robust growth. In this issue, we delve into the dynamic landscape of India's AV sector by engaging with key players, including consultants, system integrators, and renowned brands. We explore the challenges and opportunities that are shaping the future of this industry and discuss the driving factors behind its promising trajectory. The Indian AV industry faces several hurdles that are crucial to address for sustainable growth. These challenges include inadequate infrastructure and connectivity, government regulations, a shortage of skilled manpower, and a general lack of awareness about the potential of AV technology. Despite these roadblocks, industry insiders remain buoyant, fuelled by a shared vision of a prosperous future. One of the key drivers of optimism is the expected expansion of the AV industry into rural and Tier 3 cities. This movement is set to redefine education and other sectors, presenting a wealth of opportunities. The rise of hybrid workflows enables companies to establish satellite offices in these cities, reducing operational costs while maintaining productivity, fostering inclusive growth. The

Indian government is wholeheartedly committed to infrastructure development. It has embarked on initiatives aimed at promoting domestic tourism, which, in turn, offers untapped opportunities for the AV industry. Museums, heritage sites, science centers, and tourist destinations are poised for transformation with the infusion of cutting-edge AV technology, creating immersive experiences for visitors. All signs point to India becoming one of the AV powerhouses in Asia.



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Jio World Centre- NMACC, Mumbai, India



Unlocking Growth and Innovation: A Decade of Impact in India for 3CDN Workplace Tech



Key Milestones in India

3CDN Workplace Tech (3CDN) embarked on its Indian odyssey in the year 2010-11. Since then, the organization has achieved several significant milestones. In 2014-15, they implemented Pareto's 80/20 rule, emphasizing the enterprise and corporate space, which contributed to over 80% of their revenue. This strategic shift allowed them to focus their efforts where they yielded the most results. In 2016, 3CDN doubled down on their enterprise strategy by opening an office in the tech hub of India, Bangalore. This move bolstered their presence in a city known for its innovative spirit.

Future Plans and Expansion

India's vast and diverse market offers immense growth potential, and 3CDN is determined to capitalize on this. Their presence has been a boon to their clients, providing quick responses and tailored solutions. To fortify their standing, 3CDN plans to continue investing in human resources, expanding their offices, and broadening their reach across different regions in the country. Their enterprise-focused strategy is set for the long haul.

Challenges and Resolutions

One of the primary challenges faced by 3CDN is the scarcity of talent. The competition for skilled professionals is fierce, and the absence of a mature HR function within many organizations, including their own, compounds the problem. Mradul

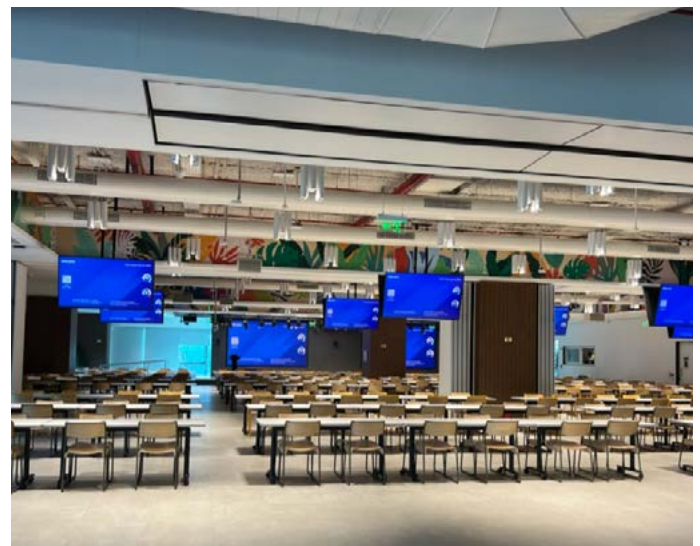
acknowledges that a substantial part of his time is devoted to addressing this issue.

"To tackle this challenge, we have adopted both short-term and long-term strategies. In the long run, we are grooming fresh talent to become part of our growing workforce. In the short term, we are turning to technology, leveraging AI tools to bridge skill gaps and enhance the quality of our documentation."

Growth Opportunities and Emerging Trends

The enterprise space continues to be a robust growth segment for 3CDN. Hybrid workflows and the resurgence of in-person office work create a demand for our services. A segment that remains largely untapped is the government sector, which has witnessed remarkable growth in recent years. By combining these opportunities, 3CDN envisions covering a significant portion of the professional AV market in India.

Mradul highlights, "Tier-1 cities are poised for expansion and consolidation, capturing the lion's share of the market. However, the growth potential in Tier-2 and 3 cities is noteworthy. The rise of hybrid workflows allows companies to establish satellite offices in these areas, reducing costs while maintaining productivity. Additionally, infrastructure development in Tier 2 and 3 cities opens doors for increased AV spending."



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when you can
make things
easy?
How to
impress
without breaking
the bank? Why
waste energy
if there's a
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Performance Over the Decade

The last decade has witnessed significant fluctuations in business performance. The COVID-19 pandemic disrupted business activities, causing a dip in growth rates. Before the pandemic, the industry was averaging growth rates of 10-15%. In 2022-23, the industry experienced an impressive recovery, with growth rates exceeding 30%.

Future Growth Targets

In the next five years, 3CDN aims to achieve a minimum growth rate matching the Consumer Price Index (CPI) at around 10% and aligning with the GDP growth rate at approximately 8%. In essence, 3CDN aspires to achieve a consistent year-on-year growth of 20%.

Industry Outlook

The last decade has witnessed significant fluctuations in business performance. The COVID-19 pandemic disrupted business activities, causing a dip in growth rates. Before the pandemic, the industry was averaging growth rates of 10-15%. In 2022-23, the industry experienced an impressive recovery, with growth rates exceeding 30%.

The AV industry in India is on the cusp of transformation. "We envision a shift towards services and software as the primary revenue drivers, aligning with industry reports such as AVIXA's IOTA. The integration of content into projects plays a pivotal role in this evolving landscape," says Mradul.

Mradul also touches on emerging technologies. "Virtual Reality (VR) and Augmented Reality (AR) may manifest primarily as personal devices. However, IoT and AI offer unique user experiences, especially in the enterprise space. This represents a significant opportunity for AV partners to expand their scope beyond conference rooms."

Staying Competitive in a Rapidly Evolving Industry

Mradul states that the key to staying competitive in the AV industry lies in agility and adaptability. The rapid adoption of new technologies and the constant evolution of the market necessitate a nimble approach across all business functions, from go-to-market strategies to partnerships and employee engagement.

Vision for the AV Industry in India

Mradul's vision for the AV industry in India is one of optimism and enthusiasm. The industry's remarkable growth, despite its niche nature, is attracting significant interest and investments from venture capitalists and private equity firms. Moreover, the influx of talent from the IT sector into the AV industry confirms that a career in this field is not just viable but also promising.

3CDN has established a strong foothold in India over the past decade, overcoming challenges and seizing growth opportunities. With a focus on talent, innovation, and adaptability, the company is poised for an even more promising future in India's burgeoning AV industry.

<https://3cdn.tech/>

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^{*}Source: Futuresource Consulting. [^]Colour brightness (colour light output) in brightest mode, measured by a third-party lab in accordance with IDMS 15.4. Colour brightness will vary depending on usage conditions. Top-selling Epson 3LCD projectors versus top-selling 1-chip DLP projectors based on NPD sales data for May 2017 – April 2018. ^{*}3 years or 20,000 hours, whichever is earlier.

Navigating the Future: An Insight from Play Technologies



Sachin K Jain
Principal Designer, PLAY



AV design and installation of the lobby at JW Marriott Hotel, Pune, by Play.

Key Milestones

Since its establishment in 1997, PLAY embarked on a transformative journey in the Indian AV industry. Initially starting as an AV trader specializing in Overhead Projectors, they later became distributors for Birla3M's Multimedia Projectors in the West region. Following 3M's exit from India, PLAY were appointed as Hitachi's distributor for projectors, and subsequently, for Plasma and LCD displays. By 2007, the organization shifted its focus to Design Consultancy and Design & Build assignments, setting the stage for their continued growth in the industry. Their work on landmark projects, both within India and internationally, has solidified their reputation. In 2015, the organization expanded to the Middle East market by establishing an office in the UAE.

"Our commitment to developing talent is evident in the fact that many of our team members who started their AV careers with the organization now hold senior positions in leading AV companies. PLAY has a long-standing commitment to organic growth, with a core emphasis on quality over quantity," says Sachin.

Future Plans

"We are poised for expansion in India, aiming to have a greater team presence across the country. Our expansion strategy adheres to our established mantra of delivering superior job quality over quantity. This approach reflects our commitment to maintaining our high standards as we grow our footprint in the country," adds Sachin.

Challenges and Resolutions

Several challenges confront the Indian AV industry, from a shortage of skilled manpower to increasing competition from MEP and IT providers. These service providers often subcontract AV services to OEMs and distributors, leading to price competition and making it challenging for the AV industry to compete. PLAY is addressing these challenges by hiring engineers from diverse backgrounds and training them in AV. Additionally, they engage in client education to emphasize the importance of trained and certified AV teams.

Opportunities

The Indian AV industry presents several growth opportunities, particularly in government-driven projects, as the nation focuses on extensive infrastructure development. Emerging trends, such as Projection Mapping and active LED displays, contribute to the growth of AV projects. The shift towards hybrid working and web conferencing has created opportunities in creating collaborative spaces with advanced unified communications solutions.

Promising Cities and States

Delhi, Bengaluru, Tamil Nadu, Uttar Pradesh, and Gujarat are recognized as areas with significant opportunities. Delhi is central to major government projects, while Bengaluru and Tamil Nadu attract companies for offshore and production facilities, respectively. Uttar Pradesh and Gujarat also exhibit promise for the AV industry.



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Play was the consultant for the National Institute of Securities Market Campus, Navi Mumbai.



Zydus Corporate Office, Ahmedabad by Play.

Performance and Targets

Despite challenges, PLAY has exhibited consistent growth in the past decade, with the exception of the COVID-19 pandemic. Looking ahead, their target is an ambitious growth rate of 30% year-on-year for the next five years. This reflects their confidence in their expanding organization.

Industry Outlook

The Indian AV industry is poised to evolve into a recognized practice, placing a strong emphasis on trained and certified manpower. Consolidation through mergers and acquisitions is expected, as larger players expand regionally. Interactive video-based solutions are predicted to gain prominence, creating further opportunities.

Emerging Technologies

Technologies like virtual reality (VR), augmented reality (AR), and artificial intelligence (AI) will play an integral role in the future of the Indian AV industry. These innovations will enhance integration quality and provide new user experiences, shaping the industry's future.

Staying Competitive

To stay competitive in the rapidly evolving AV industry, continual training, certifications, and adoption of emerging technologies are essential. Staying ahead of the curve requires a commitment to learning and adapting to changing technology.

Hope and Vision for the AV Industry in India

"Our hope and vision for the Indian AV industry is optimistic. We anticipate exponential growth, with the industry being recognized as a separate and vital contributor, similar to IT and MEP services," says a confident Sachin.

www.playtechnologies.in

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Kramer: Shaping the Future with Technology and Innovation



Kirti S Shetti
Country Manager
South Asia, Kramer India

Kramer's Transformative Journey

Kramer has spent the last year undergoing a significant business transformation. With a goal to triple revenue in the next three years, it has created a regional structure across Europe, APAC, and the Americas to better serve customers and partners.

A major step in its global expansion and strategic investment is the new R&D (research and development) center in Noida, India. This is an extension to its global R&D organization with offices in Israel and Canada.

At Kramer, we redefine how people engage with the world. And that includes our relationship with our partners and distributors. That's why we've taken the concept up a notch to create the exclusive Kramer ENGAGE program as a framework to invest in and help Partners & Distributors grow their Kramer business.

Kramer is on the frontline of what's next, and we strive to deliver the world's leading audio-visual experiences. The latest Kramer products – Series-3 is a comprehensive portfolio of fully interoperable audio-visual signal management products, extended portfolio of enhanced USB-C products, high performance and scalable AVoIP solutions, the new line of Kramer collaboration devices, plus, the company's latest software solutions focus on providing a solution-centric approach to the market.

Vertical Segments Driving Growth

The borders between where we work and learn have changed dramatically, blurring in some cases, and all-but-disappearing in others. Enterprises have adapted to a new physio-digi (physical-digital) world. With hybrid, plug and play solutions, companies aim at automating processes. Making workspace more collaborative and efficient is at the heart of Kramer's work. Kramer's inherently flexible, future-forward solutions are designed to support changing needs as the market evolves.

We are witnessing a digital revolution across our nation and as masters of cutting edge and secure technology, Kramer is committed to bring the digital transformation in multiple government-led projects.

Teaching and learning today look very different to just a few years ago. As technology has advanced, varied new learning models have come to the fore. Kramer has taken the lead in meeting these requirements by providing complete, secure, platform-agnostic solutions for innovative learning spaces. Leveraging our deep knowledge and expertise in the global education market, and combining state-of-the-art communication applications and varied devices, our end-to-end solutions enable new teaching and learning experiences that help educational institutions stay ahead.

The healthcare industry in India is one of the fastest-growing sectors. Technology has the potential to significantly improve India's health infrastructure by improving access, affordability, and quality of healthcare services. Kramer delivers the uncompromising quality and reliability that healthcare providers depend on. Medical professionals rely on Kramer to route high-quality images that can teach, save lives, and provide security in healthcare facilities.

India's tourism sector is booming after covid and there is an evident paradigm shift in consumer behavior that is reflected in the hospitality industry. Investment in the hospitality sector is increasing tremendously, there is a myriad of audio-visual requirements for the new facilities or upgrading an existing facility. From signal management to digital signage, to control systems Kramer solutions are modular, easily configurable, and simple to use.



Kramer India organised the k-WAVE industry engagement initiative in India, this year. The event travelled over six weeks across six cities, including Bengaluru, Mumbai, Pune, Delhi, Chennai, and Ahmedabad, and connected with over 600 industry stakeholders.

The Role of Emerging Technologies

In recent years, Kramer has been shifting its strategy and investing in IT-friendly Pro AV solutions Integrating hardware, software, and cloud systems. Software-driven AV functionality on a single device is implemented throughout different systems, creating Kramer Open AV Platforms. This scalable and smart approach to AV architecture enables multiple functionalities like integrated video conferencing coupled with powerful room control and automation, digital signage, and much more.

The industry is at the final stages of the convergence shift. IT has taken over AV, which requires a new approach to AV in general. It requires new kinds of solutions and different ways of working. We are committed to positioning Kramer as a provider of IT-friendly AV solutions, investing heavily in meeting the challenges and motivations of the IT department. We have integrated our IT-friendly philosophy into many of our products and solutions. The Kramer AV over IT approach is aimed at making AV systems and services completely IT-friendly – Easy, Secure, and Managed.

To summarise, we are making AV systems and services completely IT-friendly by making them easy to integrate and install, failsafe, secure from cyber-attacks, and manageable in a way that an IT professional would expect.

Remaining Competitive in the AV Industry

Technology is growing exponentially; it is vital to be agile and evolve with the industry to stay ahead of the curve. The Pro AV industry had already developed hybrid technologies years before the pandemic arrived, but the need for intuitive and more seamless hybrid solutions persists. As such, it is our responsibility to continue innovating for Gen H by listening to users' challenges, insights, and suggestions.

At Kramer we're never satisfied with the status quo; we question things and don't believe that just because things have been done "that" way in the past, they'll stay that way in the future. Innovation is accelerating, Research and Development is at the center of our business. We don't believe in closed gardens - we advocate for open ecosystems.

In a nutshell, technologies will continue to evolve radically as businesses, we must continue to address the market by providing innovative solutions.

www.kramerav.com

Elevating Sound Experiences: ANSATA



Leslie Lean
CEO of ANSATA

In the dynamic world of audio technology, ANSATA has consistently stood out as a pioneer, reshaping industry standards with a commitment to quality, design, and service. With a journey spanning several years, ANSATA's influence has expanded across diverse segments of the audio landscape in the Indian subcontinent.

Avid Partnership and Dolby Certification: Empowering Studios

ANSATA's pro audio journey commenced in the studio market, where precision, clarity, and **unyielding** quality are paramount. The strategic partnership with Avid, a global leader in digital media solutions, enabled them to dominate the entire Film, Post production, OTT and TV.

In essence their expertise in audio technology solutions became instrumental where the nuances of DPA mics precision renowned for their transparent and uncoloured sound reproduction, making them the go-to choice for capturing the most subtle nuances in music and speech. The reliability of RME converters to ensure that audio signals are handled with utmost precision, and the accuracy of Amphion studio monitors blend seamlessly ensuring that content delivered through these platforms consistently met the stringent standards of discerning viewers.

As content creation evolved with the rise of Spatial Audio, ANSATA being Dolby Certified service partner, made a commitment to enabling studios extended far beyond providing solutions. It encompassed the holistic transformation of studio environments to align seamlessly with the spatial audio paradigm. By tuning their room and certifying as Dolby Atmos

certified studio, Ansata ensured that content creators could fully embrace the spatial audio revolution, where audio storytelling transcended boundaries to offer immersive, three-dimensional experiences.

"We not only gained access to cutting-edge technology but also became a trusted provider of Avid solutions in the Indian market. All these collaborations allowed ANSATA to offer a comprehensive suite of tools and solutions tailored specifically to the unique needs of the studio space," says Leslie Lean, CEO of ANSATA.

Venturing into Touring Sound with d&b Audiotechnik: Reliability at the Forefront

Recognizing the need for diversification, ANSATA strategically partnered with d&b audiotechnik, a globally renowned name in professional audio. This collaboration marked their entry into the demanding touring sound market. Here, where reliability and exceptional performance are non-negotiable, ANSATA's prowess shone through. d&b audiotechnik's position atop tech riders further solidified its relevance and credibility in the touring sound market in India and worldwide. To fully appreciate the significance of this collaboration, it's essential to explore the ethos, principles, and visionary approach that define d&b audiotechnik.

Democracy for Listeners: Elevating Sound Quality for All

Central to d&b audiotechnik's philosophy is the belief that everyone, regardless of their position in the audience, should experience the same impeccable quality of sound. This fair-minded preoccupation is embedded in the company's mission.

Another cornerstone is the idea that loudspeakers and electronics should be systematically built to work in total unity. This commitment to integration is a fundamental principle, ensuring that d&b loudspeakers can only be driven by d&b amplifiers. This exclusive but technically beneficial union maximizes efficiency, consistency, and ease of use.

At the heart of their holistic way of working, emphasizing the importance of the whole and the interdependence of its parts. This holistic approach has a name: the **d&b System Reality**. What began with the integration of amplifiers and loudspeakers now permeates the company's core, influencing not only its product offerings but also the way it conducts business and the integration of new technologies into existing practices.



Ansata won an award for its exceptional design of the Grand Theatre of Nita Mukesh Ambani Cultural Centre (NMACC).

In the context of Ansata's collaboration with d&b audiotechnik, these principles come to life, creating a synergy that elevates the touring sound market in India. Ansata's role as a strategic partner ensures that the d&b System Reality is effectively translated into immersive sound experiences at diverse events and venues across the country.

Setting Sights on Install Sound: Tailored Solutions Across Diverse Applications

Building upon these achievements, ANSATA shifted its focus to the burgeoning install sound market. This strategic pivot underscores the company's commitment to providing holistic and integrated audio solutions for diverse applications, including Performance venues, Club sound, Houses of worship (HOW), Corporate spaces, Dolby Cinema theatres, and Government projects to name a few. ANSATA's dedicated team of experts ensures that every project receives meticulous planning and design, aligning seamlessly with the distinctive needs and expectations of clients.

A Commitment to High-Quality Design Processes: Excellence in Every Detail

At the core of ANSATA's success lies its unwavering commitment to high-quality design processes. They have a dedicated team for each vertical of install sound which follows a Design practice that includes understanding exact customer requirements, understanding the room and using an elaborate questionnaire, doing a very precise Electroacoustic design using ArrayCalc and EASE as needed and creating a proposal with all the details such as inventory, budget, delivery timeline and acoustic predictions of the room. Every project undergoes rigorous planning and meticulous

design. "We do multiple iterations till we are sure that the designed solution is the best. We have access to an extended team of designers at d&b Germany for consulting in case of large and complex projects," says Leslie.

Training and Warranty Assurance: Maximizing Utility and Peace of Mind

ANSATA goes the extra mile by offering comprehensive training programs for its partners, ensuring that clients and end-users can effectively operate and maintain the installed solutions. In addition, they provide an impressive 5-year warranty on all hardware, online and offline support, combined with the strategic location of warehouses for rapid hardware replacement keeping an inventory of spares, underlining its commitment to reliability and customer satisfaction.

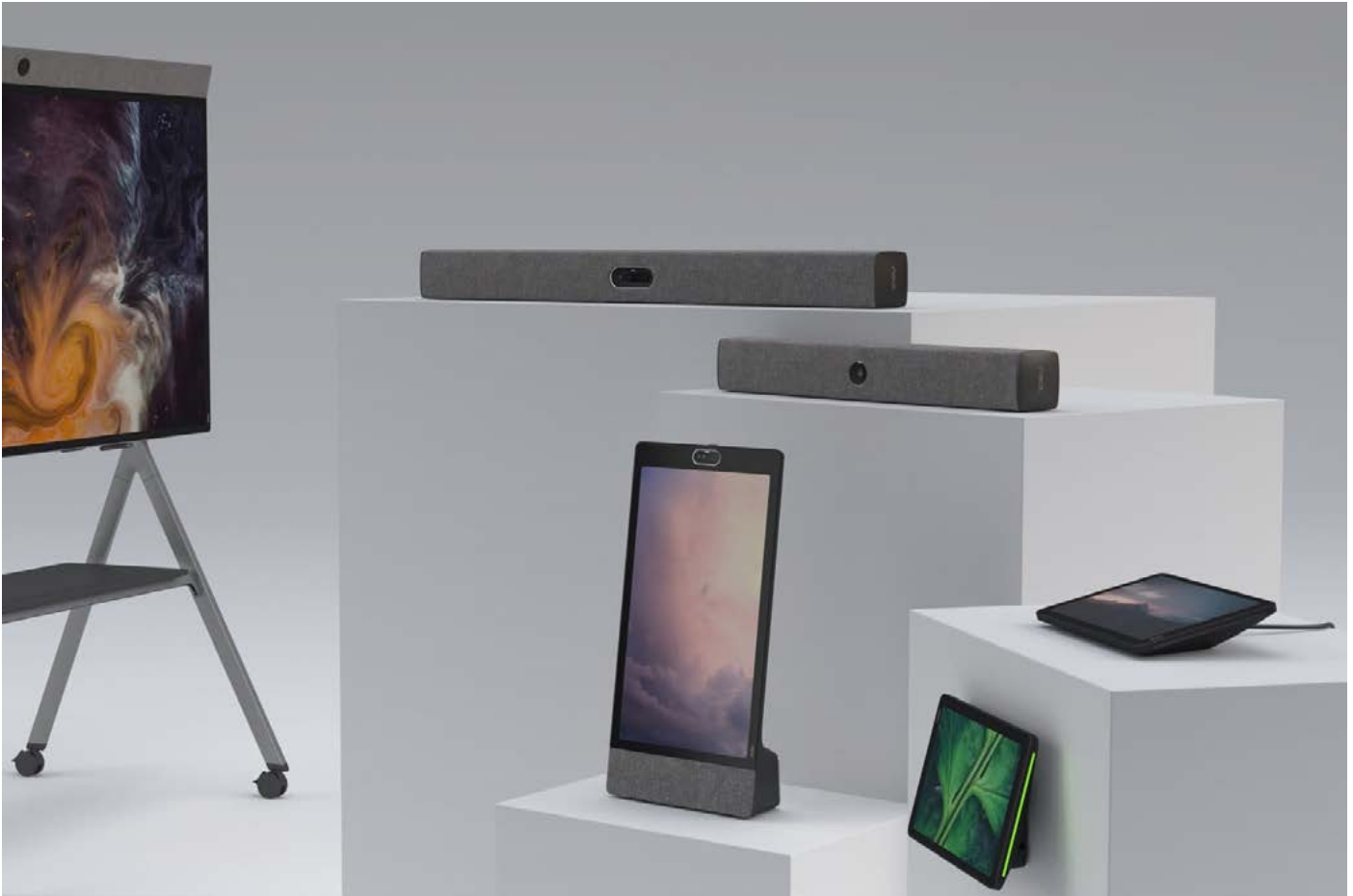
World-Class Service: A Promise Delivered

Understanding the pivotal role that service plays in the audio industry, ANSATA prides itself on providing world-class support. This ongoing commitment guarantees that its solutions perform optimally throughout their lifecycle.

ANSATA's journey is anchored in its commitment to innovation and technical expertise. Whether in a studio, at a live event, or within an installation project, ANSATA's dedication to quality, design, and service is unwavering, ensuring that every audio solution surpasses industry standards. "As we look forward to the future, our mission remains steadfast: to continue innovating and elevating sound experiences for partners and clients across the ever-evolving audio landscape", says Leslie.

www.ANSATA.net

Neat: Revolutionizing the Workplace with Innovative Solutions



Oslo-based Neat, founded in 2019 by a team of creative visionaries with a history of shaping innovations for top video communications brands, is transforming the way we work with its cutting-edge solutions. Neat's mission is to inspire creativity and flexibility in the workplace by providing devices that seamlessly integrate with popular platforms such as Microsoft Teams and Zoom.

The Neat Product Lineup

Neat offers a range of innovative solutions designed to enhance meetings and collaboration:

* Neat Bar: This compact device is tailor-made for Zoom and Microsoft Teams, delivering superior audio and video quality for meetings of up to ten people. It offers flexibility in mounting options and includes the intuitive Neat Pad for effortless meeting control.

* Neat Board: An all-in-one meeting room solution equipped with a 65-inch multi-touch screen, powerful audio capabilities, and a wide-angle camera. Neat Board goes beyond video meetings, enabling real-time annotation and whiteboarding for enhanced collaboration.

* Neat Frame: Featuring a 15.6-inch portrait screen with exceptional brightness and audio quality, Neat Frame is perfect for huddle spaces or the home office. It excels at capturing every detail, eliminating background noise, and providing a clear communication experience.

* Neat Pad: A sleek and versatile touch screen designed for meeting control and displaying room availability. Powered by a single Power over Ethernet cable, Neat Pad is always ready for action.

* Neat Center: This companion device ensures remote participants remain at the center of the conversation by framing them face-on. It's easy to set up, can be placed anywhere for optimal viewing, and enhances hybrid meetings.

* Neat Pulse: Neat's full-service offering provides control over device deployment, premium support, and extended warranty coverage. Users can monitor room occupancy and air quality with real-time device status reporting.

Recognitions and Patented Technologies

Neat's commitment to excellence is evident in its numerous accolades. Neat Bar, Neat Pro, Neat Board, and Neat Frame have all been honoured with Red Dot Design awards. Additionally, Neat boasts patented technologies, including the ground-breaking Neat Symmetry. This innovation utilizes machine learning to make video meetings feel remarkably natural by automatically framing participants for more engaging interactions.

Neat Boundary: Keeping Distractions at Bay

One of Neat's standout features, available on all Neat devices, is Neat Boundary. It allows users to define the width and depth of their meeting space, ensuring the camera only captures relevant content within the specified boundaries. This feature proves invaluable in open-plan offices and home settings, fostering focus during video meetings.



Manu Sharma, Manager for India & SAARC

Expanding Horizons in India

Neat's reach extends to India, where it has been making significant strides. In March 2022, Manu Sharma joined as Territory Manager for India & SAARC. The company's presence

in India began in October 2021 when Vega India and RAHI Systems, serving multinational customers, became its first partners.

"When I joined the team, my primary goal was to drive business expansion, and I'm delighted to share a significant achievement on that front. We secured a strategic partnership with Ingram Micro India, one of the largest IT distributors in the country. This partnership brought us several substantial advantages. Ingram Micro integrated our solutions into their extensive warehouse inventory, which resulted in a remarkable reduction in order fulfillment times. What used to take 6 to 8 weeks to deliver can now be accomplished much more swiftly.

This operational efficiency not only set us apart from our competitors but also had a dual impact. First, it piqued the interest of AV companies, leading them to explore potential collaborations as Neat partners. Secondly, end users who required devices urgently took notice of our solutions. After experiencing firsthand the quality and user experience of our products through demonstrations, they chose to engage with us, resulting in a tangible boost to our business," shares Manu.

Manu further states, "Because we are working with Ingram Micro, we have now expanded our partner channels. From two partners we now have 40 partners right across India."

With the market in India opening up, Neat is focusing on the corporate, government, and banking sectors. The company also plans to target CXOs and family offices with innovative products like the Neat Board 50, a versatile video conferencing device with a unique design element.

Future Plans

Neat's future plans include the launch of Neat Center early next year, a device that can pair with other devices over the network without the need for physical connections. This innovation promises to simplify the process of adding cameras and microphones to workspace set-ups without requiring retrofitting.

Neat is poised to continue its growth trajectory by revolutionizing the way we collaborate and communicate in the modern workplace. With its innovative solutions and a commitment to excellence, Neat is set to shape the future of collaboration.

<https://neat.no/>

Pioneering Excellence: Barco India's Journey in the AV Industry



Mainak Sengupta
National Sales Head of ProAV
Events at Barco India

Key Milestones and a Significant Local Footprint

Barco India's story began in Noida, where it established its headquarters. With facilities encompassing Research and Development, Software Development, Manufacturing, Sales, and Marketing, Barco India swiftly carved its niche in the market. Since its inception, the company has evolved into a market leader and earned a reputation as a hi-tech multinational corporation with a notable local presence, focusing on operational excellence.

Barco India's commitment to its partners and customers is evident in its nationwide network of service support engineers,

ensuring efficient and prompt after-sales assistance. The organization's relentless pursuit of excellence has resulted in accolades, including being recognized as a Great Place to Work for three consecutive years.

Innovative AV Solutions for Diverse Verticals

Barco India specializes in cutting-edge visualization and collaboration solutions that cater to the healthcare, enterprise, and entertainment sectors. Their offerings include projector and image processing, video wall displays, digital cinema projectors, medical displays, immersive systems, and meeting/collaboration solutions.

Mainak states, "One prominent growth trend in the Indian AV industry is the digitization of museums and the creation of immersive experiences. Barco India is at the forefront of this movement, leveraging projection technology to transform museums into interactive spaces. Government support in the form of tourism-boosting policies and initiatives has led to the establishment and renovation of museums with digital interaction, fuelling the demand for our innovative solutions."

Mainak further adds, "The enterprise and technology sectors both indicate a highly positive outlook for projection technology, making it a lucrative avenue for Barco's products. With a diverse portfolio of projectors, ranging from high-brightness models like the UDX and UDM series to the more cost-effective yet powerful



Projection mapping at historical Cellular Jail India.



Projection mapping at Statue of Belief – Nathdwara.



The Barco G50 projector.

G-series projectors, Barco India is ready to create unforgettable experiences in museums, experience centers, and outdoor projection mapping sites.”

In addition to their expertise in projection technology, Barco's innovation and technologies in visualization displays and hybrid meeting room solutions, such as ClickShare Conference, position them as one of the preferred brands in India.

The Future of the Indian AV Industry

Looking ahead, Barco India envisions a promising future for the AV industry in the country. Government investments and initiatives aimed at promoting domestic tourism offer untapped opportunities, particularly in museums, heritage sites, science centres, and tourism spots. With India's rich culture, heritage, and arts, there is a wealth of untold stories waiting to be brought to life through AV technology.

Staying Competitive in a Rapidly Evolving Industry

To remain competitive and stay ahead of the curve, Barco India is committed to offering best-in-class and innovative products and solutions to its customers. Their focus on customer satisfaction extends to ensuring ease of use and peace of mind for their clients.

“Barco India leverages its strong product portfolio to cater to the diverse needs and budgets of its wide range of customers. We are dedicated to providing efficient and prompt after-sales service to ensure business continuity and positive outcomes. Barco's R&D team is continuously working on creating newer and more exciting products that address the evolving needs of customers. With the support of our software development team and a state-of-the-art R&D facility in India, Barco India is poised to expand its footprint in India with a unique hardware and software approach” says a pleased Mainak.

Barco India's journey in the AV industry has been marked by innovation, growth, and a deep commitment to customer satisfaction. With a clear vision for the future and a passion for storytelling through technology, Barco India is set to continue shaping the landscape of the Indian AV industry.

www.barco.com

Epson India: Transforming the AV Landscape



Epson India Pvt. Ltd. was established in 2000 with a commitment to delivering products and services that exceed expectations. The company, headquartered in Bangalore, quickly gained an enviable reputation for quality and value. Today, Epson India addresses the needs of homes, businesses, and specialized consumers, with a robust product portfolio.

In the fiscal year 2022, Epson India achieved a turnover of INR 2,196 Crores, with the projector business contributing 18% of the revenue. Epson is recognized as the No. 1 projector brand in the world for the last 20 years and in India for the last 5 years, with a market share of 32.4% in FY 2022. This growth reflects

Epson's dedication to efficient, compact, and precise innovation, which enriches lives and contributes to making the world a better place.

Future Plans and Commitment

"We see India as a high-priority market with tremendous growth potential. We continue to expand our footprint and product portfolio, catering to a diverse range of audiences. From home to business solutions, Epson aims to build efficiencies, reduce costs, encourage creativity, and lessen the environmental burden. The focus remains on innovation that enriches lives and contributes to a better world," says Harish.

Challenges and Resilience

Epson India is confident in its growth prospects and envisions further accelerated growth across various segments. While the organization does not foresee significant challenges, it remains adaptable in the face of unforeseen circumstances, such as the disruptions experienced during the pandemic. "Epson India is well-prepared, with high-quality products, advanced technology, and a growing brand presence," adds Harish.

Vertical Segments and Emerging Trends

Epson projectors have a strong presence across various verticals. The Education, Corporate, GeM, and Home Theatre



Adi Yogi - Isha Foundation, Bangalore.



Kashi Vishwanath Dham- Varanasi.

segments are top performers, offering excellent growth opportunities. As an industry pioneer and the inventor of 3LCD technology, Epson India has been at the forefront of innovations in projection technology. The industry is expected to shift from lamp-based projectors to laser light source projectors, supporting specialized AV solutions like immersive displays, where is strong opportunity. Harish says, “We recognize opportunities across the country and have a robust sales and dealer network in place to meet the requirements of various segments and markets.”

Impressive Growth Over the Decade

Epson India has shown remarkable growth over the past decade. From FY20 to FY22, the company achieved a compound annual growth rate (CAGR) of 14.54% at an overall business level. The projector business, in particular, experienced substantial growth, with a CAGR of 35.78%. This growth can be attributed to a commitment to innovation, technological advancements, a strengthened distribution network, and the increasing demand for home theatre projectors.

Ambitious Growth Targets

Epson India’s goal for the next five years is to maintain robust and consistent growth, exceeding the growth of the Indian economy. A conservative estimate is to achieve 15% year-on-year (YoY) growth from FY23 to FY28.

The Future of the Indian AV Industry

“The Indian AV industry is poised for significant change, driven by technological advancements. Hybrid meeting rooms are a key trend, bridging the gap between physical and virtual collaboration, enhancing coordination, communication, and productivity.,” says Harish.

Role of Emerging Technologies

Harish acknowledges that emerging technologies like Virtual Reality (VR), Augmented Reality (AR), and Artificial Intelligence (AI) will play a crucial role, enhancing user experiences through immersive environments and interactions. These innovations will foster an ecosystem where AV becomes more personalized, efficient, and affordable.

Staying Competitive in the Industry

Professionals and businesses can stay competitive by prioritizing the development of technical skills, adopting new technologies, and staying updated with the latest AV trends and applications.

Vision for the AV Industry in India

“Our vision is to provide cutting-edge AV solutions that bring images to life, reduce distances, enhance business efficiency, and foster creativity and learning on an unprecedented scale. Epson India is dedicated to enriching lives and contributing to a better world through innovative technology,” concludes Harish.

www.epson.co.in

Elevating the AV Landscape: Christie India's Journey and Vision



Rishubh Nayar
Sales Director for India
Enterprise, Christie Digital

Milestones and Remarkable Growth

Christie India's journey began in 2004 as a modest liaison office with just two employees. Fast forward to today, and it has evolved into a private limited company with nearly 40 staff members in the vibrant city of Bangalore, Karnataka. This journey has been marked by substantial revenue growth and innovative installations, not only within India but on a global scale. Christie India proudly houses an impressive experience centre and a dedicated clean room for projector light engine maintenance in Bangalore. Their reach extends to major cities like New Delhi.

Christie India's efforts have been recognized through a series of awe-inspiring projects, including iconic installations at landmarks like the Statue of Unity. Mesmerizing son et lumière shows at historic sites like the Red Fort in Delhi, Gateway of India in Mumbai, and Victoria Memorial in Kolkata have solidified their reputation as industry leaders.

Future Plans and Commitment

"Christie India is deeply committed to harnessing India's immense potential and driving progress within the region. Beyond state-of-the-art technology, the organization is expanding its workforce and infrastructure to enhance customer support throughout South Asia. The future promises exciting developments, and Christie India is dedicated to embracing these transformative opportunities," says Rishubh.

Challenges and Resilience

While India's dynamic market offers tremendous growth opportunities, it also presents unique challenges, including certifications and regulations. Christie India recognizes these challenges as opportunities for growth. Their commitment to providing end-to-end visual and integrated solutions has enabled them to navigate the complexities of the Indian business environment effectively. Christie India's agility and foresight set them apart, helping them overcome obstacles and strengthen their position as industry leaders.

Vertical Segments and Emerging Trends

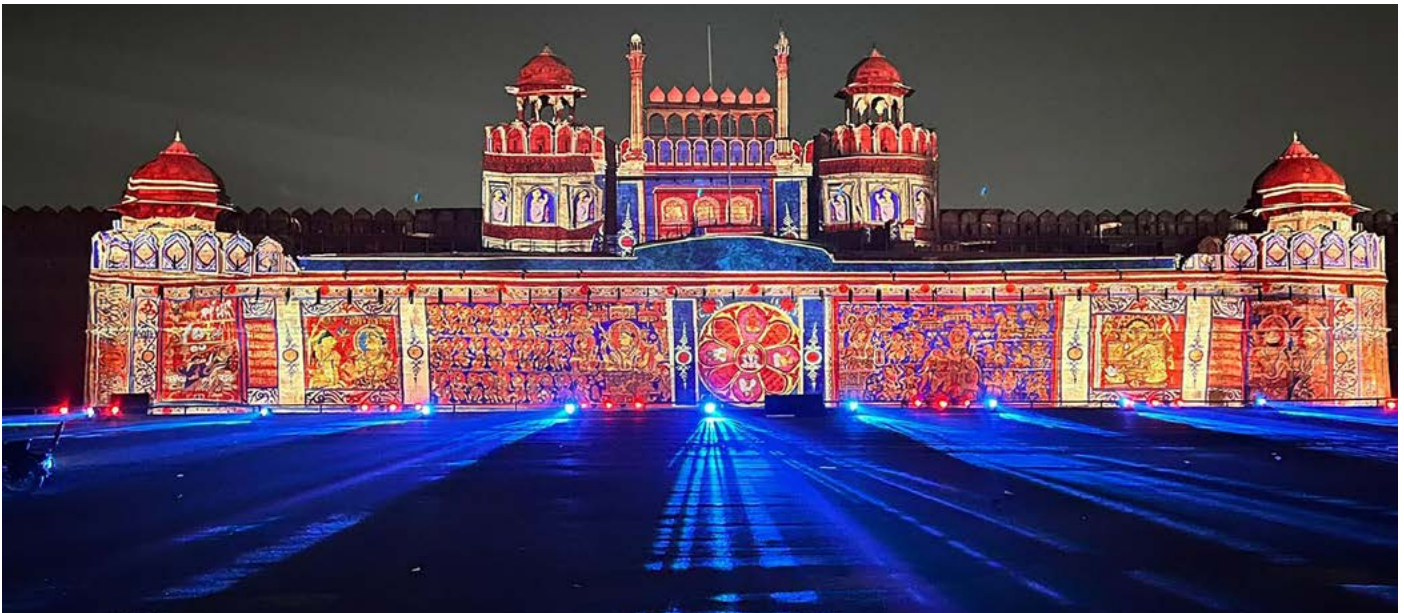
Rishubh comments, "Growth opportunities are evident across all vertical markets Christie India targets. Notably, experiential installations, particularly in Tier 2-3 cities like Ahmadabad, Kanpur, and Chandigarh, offer immense potential. India's focus on creating captivating visitor attractions, such as museums and son et lumière shows, is a reflection of a nation keen on showcasing its rich cultural heritage. Christie India's innovative visual solutions, including our flagship Griffyn Series and M 4K RGB Series pure laser projectors, are at the forefront of enabling these immersive experiences."

Impressive Performance and Ambitious Goals

Over the past decade, Christie India has achieved remarkable growth, with a three-fold increase in revenue. Their commitment to excellence and the trust placed in them by their clients have been key drivers of this expansion. "Our goal for the next



Gateway of India light & sound show.



Red Fort projection mapping show.

five years is not just to double our revenue but to solidify our position as an undisputed market leader. We are determined to meet and exceed expectations by continuing to innovate, invest in technology, and provide exceptional customer support.”

The Future of the Indian AV Industry

Christie India anticipates substantial growth in rural and Tier 3 cities, with AV technology poised to redefine crucial sectors like education. Government commitments to infrastructure development and tourism will catalyze substantial investments. “This dynamic landscape positions India as a strong contender to emerge as a global ProAV powerhouse, with Christie India pioneering innovative solutions,” adds Rishubh.

Role of Emerging Technologies

Virtual reality (VR), augmented reality (AR), and artificial intelligence (AI) are set to transform the Indian AV industry. VR offers immersive environments for education, entertainment, and training. AR enhances user experiences by overlaying digital information on the real world. AI automates tasks like content recommendation and speech recognition, providing personalized and efficient audiovisual experiences. “These innovations are crucial for the AV industry to stay competitive and meet evolving consumer demands.”

Staying Ahead in the Industry

Staying competitive in the rapidly evolving AV industry requires constant innovation, a commitment to delivering exceptional customer experiences, and comprehensive after-sales support.



Victoria Memorial light & sound show.

Christie India's investment in research and development, cutting-edge products, and a customer-centric approach ensures they remain at the forefront.

Vision for the Indian AV Industry

Rishubh Nayar's vision for the Indian AV industry is one of optimism and limitless possibilities. He foresees India's AV industry continuing to grow strongly and becoming known for innovation, creativity, and groundbreaking installations. As India showcases its rich history and culture to the world, Christie India hopes to be at the forefront of creating these captivating experiences and inspiring more young talents to join the industry, making it vibrant and filled with limitless potential.

www.christiedigital.com

Sennheiser: Optimistic about the Explosive Growth Potential of the AV industry in India

Naveen Sridhara
Director of Sales for Business
Communication in India,
Sennheiser India



Since the establishment of our office in India in January 2007, we have achieved several key milestones that have contributed to our growth and success. Our first office was established in Gurgaon, a city located in the state of Haryana. Recognizing the immense potential for business growth, we expanded our presence by opening branch offices in Bangalore and Mumbai, two prominent cities in India. To enhance the customer experience, we have also set up an experience center in Bangalore. This center serves as a hub for showcasing our products and solutions, allowing customers to witness firsthand the benefits and functionalities they offer.

Future Plans and Expansion

India holds immense potential, making it a crucial market for us. We have made substantial investments in our Business Communication division by bringing together a team of talented individuals and allocating resources to develop customized solutions that drive growth. Our journey in India has been remarkable thus far, and we are dedicated to maintaining our focus. Our approach revolves around engaging with our partners and end-users, understanding their specific requirements and expectations, and crafting solutions that simplify collaboration and learning. Our goal is to empower end-users to concentrate on their meetings and learning, leaving the rest to us. Moving forward, we plan to further expand our presence and market reach by collaborating with additional partners and enhancing accessibility to our products for end-users.

Opportunities Across India

While cities like Delhi, Mumbai, Bangalore, Hyderabad, Ahmedabad, and Pune continue to be our major hubs for business and growth, we also recognize the potential that lies within other tier 2 markets.

Key Challenges

One of the ongoing challenges we encounter is the availability of skilled manpower in the AV industry. While we are dedicated to hiring and retaining the best talent, there is a significant lack of awareness about the AV industry as a whole. This makes it difficult for us to attract qualified professionals who possess the necessary expertise and understanding of our field. We are actively working to raise awareness and educate individuals about the opportunities and benefits of working in the AV industry.

In terms of government regulations, we believe that expediting the process of license or product approval would greatly benefit our organization and the industry as a whole. Timely approvals would enable manufacturers to plan their product positioning effectively, aligning with market demands and desired timelines. Streamlining the approval process would not only enhance our operational efficiency but also foster innovation and growth within the industry.

Additionally, infrastructure and connectivity issues pose significant challenges to our growth. The AV industry heavily relies on robust infrastructure and seamless connectivity to deliver high-quality services and products. In areas where infrastructure and connectivity are inadequate or unreliable, our ability to expand our operations and reach new markets is hindered. Addressing these issues and investing in the necessary infrastructure improvements would greatly support our growth goals and enable us to provide enhanced services to our customers.

Addressing the Challenges

To address the ongoing challenge of skilled manpower, we have taken proactive steps to raise awareness about the AV industry and the opportunities it offers. We are actively involved in various associations that represent the AV industry, which allows us to connect with like-minded professionals and organizations. By being part of these associations, we can



The Sennheiser TCC2 installation at an education facility.

collectively put forward our concerns and work towards finding solutions. These associations also provide us with a platform to collaborate, share knowledge, and promote the AV industry as a viable and rewarding career choice.

Opportunities

India is currently experiencing a positive trajectory of growth, driven by the expansion and establishment of corporate entities. Simultaneously, the government sector is witnessing substantial infrastructure projects, presenting significant business prospects. Furthermore, in the educational sector, colleges and universities are actively embracing advanced technology to enhance the learning experience for students. This technological evolution in education represents a promising opportunity for us.

Staying Competitive

Professionals and businesses can remain competitive and stay ahead of the curve in a rapidly evolving industry by focusing on technological innovation, customer-centricity, simplicity, and adaptability. To stay ahead of the curve, professionals and businesses should continuously invest in advancing their technology offerings. This involves keeping a close eye on emerging trends and technologies within the industry and being proactive in adopting them. Whether it's incorporating artificial intelligence, automation, or other cutting-edge solutions, staying technologically current is essential.

In a rapidly changing landscape, businesses can gain a competitive edge by offering proof of concept to their customers. This means demonstrating the practicality and

effectiveness of their solutions. Providing real-world examples and success stories can instil confidence in customers and assure them about their investment.

Hope and Vision for the AV Industry

Our hope and vision for the AV (Audio-Visual) industry in India are incredibly positive and forward-looking. We see this decade as a period of exceptional promise and growth, largely driven by substantial investments from both corporate entities, government initiatives, and educational institutions.

The significant influx of investments from corporations into the AV industry is a beacon of hope. We envision a future where businesses recognize the importance of top-notch AV technology to enhance their operations, communication, and customer engagement. As the corporate sector increasingly embraces AV solutions, we expect to witness a surge in innovation and the development of cutting-edge technologies tailored to meet business needs. Additionally, Government-driven infrastructure projects and policies are pivotal in shaping the AV landscape. We anticipate continued government support and investments in AV technology.

The educational sector's commitment to implementing advanced AV technology is another source of optimism. We envision a future where colleges and universities in India are equipped with state-of-the-art AV solutions to enhance the learning experience for students. This not only prepares the younger generation for the digital age but also creates a thriving market for AV providers specializing in educational technology.

www.sennheiser.com

TechOne: Pushing the Forefront for Made In India Solutions



TechOne Innovation OPC Pvt. Ltd. (TOIPL) is a DPIIT-recognized startup based in Hyderabad, Telangana, founded by visionary AV professional **PS Tiwari** in January 2020 and started its business operations in the year 2021. TOIPL designs

and manufactures audiovisual products under the MAKE IN INDIA drive of The Government of India.

The professional AV market in India has traditionally been dominated by imported brands and products, and there is a huge scope for MADE IN INDIA products in this space. We started working on this idea in the year 2019 and designed a Ceiling Tile Microphone prototype at our small lab and workshop, which performed exceptionally well.

During the pandemic, we utilized the time to refine our product quality and after multiple revisions, we patented and produced our first ready-to-market product in the year 2021 and launched it under the AVLINKT trademark.

Having conducted multiple test installations and test calls on various platforms and venues, it truly reinforced the company's dedication to innovation when we received exciting feedback and encouraging responses from customers and partners.

Our first opportunity to install our Ceiling Tile Microphone was at NIAB Hyderabad, which received remarkable appreciation for our product quality and the performance of our microphone.

Building on this success, TOIPL has now a growing list of distinguished blue-chip customers who enthusiastically embrace our 'MADE IN INDIA' products:

While India's electronic manufacturing ecosystem is rapidly evolving, challenges persist. Established manufacturing entities, overwhelmed with existing commitments, often face extended lead times for new projects, particularly those of smaller scale, making it difficult for start-up companies like us to manage and meet production timelines.

The most challenging area is enclosure design and manufacturing as enclosure quality, printing, packaging, and branding from local vendors often do not meet the quality of international brands. We are working closely with local partners to enhance quality standards, recognizing that quality improvements are an ongoing, evolutionary process and do not happen overnight.

Currently, our main focus is on the Indian market. However, with innovation at our core, we aim to grow along with the AV industry and set new benchmarks.

We are actively pursuing certifications and compliances to position our products for entry into the global arena, marking a pivotal step towards Made in India a powerhouse in the professional AV industry.

www.toipl.com



TechOne lab where products are refined and tested.



TechOne solution installed in a boardroom.



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Indian AV: Momentum of a New Trajectory

Time to address inadequacies for sustainable growth

by Ram Bhavanashi



The Indian audio-visual (AV) industry is experiencing significant growth post-pandemic, with a newfound energy and momentum. Despite this positive trend, there are inherent inadequacies that need to be addressed for sustainable growth.

The industry's growth rate has exceeded three times the 10 percent compound annual growth rate (CAGR). Specific sectors within the AV industry, particularly in cultural tourism, have seen unprecedented growth. This includes the establishment of numerous museums dedicated to local heroes in each state, projection mapping of historical monuments, and expansive projection mapping and sound and light installations.

In sports, the ceremonial IPL fairs fitments are less than routine now; the new dynamic is about building fascinatingly massive sporting stadiums in the country. While the Narendra Modi Stadium in Ahmedabad is already an ensemble of records of sort, the Birsa Munda Hockey stadium in Rourkela is said to be the world's largest fully-seated hockey stadium. There are more in the pipeline.

There is also the emergence of some of the world's largest LED video walls, particularly in infotainment, hospitality, and corporate sectors. Thanks to the arrival of Hybrid world,

there have also been some very fascinating AV installs in the enterprise and education segment.

All said, the Central Vista project in Delhi, with the grandest new Parliament House, followed by the new Telangana Secretariat in Hyderabad have stood like a phenomenon of their own kind, with a massive deal for AV.

Perhaps, an equally important Bharat Mandapam in New Delhi hoisted Indian AV's flag high in pride with the recent hosting of G20 Summit.

Smart City Control Command Centres, Metro Rail projects, and new genre of Airports are other expressions of a new horizon of Indian AV.

This is all one side of the story. The other side is the inadequacies. The most important being primarily the lack of skilled and certified talent. Despite the industry's potential and size, there is a shortage of certified professionals. As a suggestion maybe original equipment manufacturers (OEMs) can come together to create a unified certification program, similar to the Indian School of Business model. The lack of certified talent is considered a more pressing issue than regulatory and business-related challenges. Issues like licensing, EXIM regime, standards, and business practices etc. are less impacting compared to the lack of certified talents.

It's time the industry captains synergised their minds and evolve a model that can benefit everyone.



New Parliament House, New Delhi.

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