VARDE MEDIA SOLUTIONS

The Enterprise Video Field Report
NAB Show 2026

What We Set Out to Find, What We Found, and What It Means

Photo credit: NAB

By Varde Media Solutions

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Introduction

This report closes a loop that opened before the exhibit hall doors did.

Before NAB Show 2026, Varde published a "Day 0" preview laying out four specific questions we intended to bring to the floor. Those questions were a working agenda shaped by what we hear from our clients, the corporations, healthcare systems, universities, government agencies, and institutional buyers who produce video content without calling themselves media companies.

What follows is a direct answer to each of those questions, built from four days of on-floor conversations with around 30 vendors across the full enterprise video stack. We also "attended" the *NAB Enterprise Video Strategies track* to watch a recording of one particularly useful panel discussion that put enterprise practitioners, not vendors, at the center of the conversation. Market context and competitor references in this report draw on publicly available NAB 2026 announcements and industry analysis.

A quick-reference vendor table appears at the end. The analysis comes first.

The Context: Why NAB Matters to Organizations That Don't Work in Broadcast

By now, it is well-known that the NAB Show 2026 reported more than 13,000 registered attendees identifying as corporate media professionals, nearly double the 2025 figure. The show added a dedicated Enterprise Video Strategies track for the first time, and content creator registrations grew 140% year-over-year. (*Source: NAB Show 2026 Official Wrap Statement*)

Some vendors organized booth panels explicitly targeting corporate buyers. For instance, Grass Valley hosted an insightful session titled "From Corporate Video to In-House Studio: How Enterprises Are Becoming Media Machines."

The vocabulary on the show floor may be shifting. The product design behind the marketing speak - not so much yet.

A broadcaster has an engineering team fluent in signal chains and codec specifications. The corporate buyer (the VP of Communications, the Head of Learning and Development, the CIO approving a video platform purchase) has business problems that happen to involve video. Their approval process speaks in outcomes, not specifications.

That gap was visible everywhere on the floor. Finding out which vendors had really closed it was the main task for four days.

Mission Objective 1: Who Is Building for the Enterprise Buyer?

The question going in: Which vendors are genuinely building for the corporate buyer versus which ones are adding enterprise language to broadcast-native products?

A tool designed for a broadcast engineering team and one designed for a communications department can have completely different fitness for purpose.

We wanted to find vendors who begin with the people doing the work rather than the technical specification.

What We Found

Honestly? Far fewer than the booth signage suggested, but more than at any previous show.

The clearest test was simple: How does a vendor open a conversation? Vendors built for corporate teams lead with questions about team structure, approval processes, and what success looks like twelve months out.

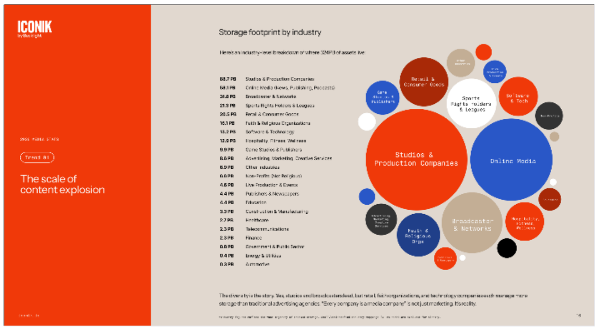
The ones retrofitting broadcast products for a new audience tended to lead with product demonstrations and technical specs.

CuttingRoom was the clearest example. Their browser-based editing platform requires no software installation, no specialist training, and no dedicated hardware. It is built for communications managers, HR producers, and field reporters: People who need to publish video without a production background. Their latest AI feature, "Shortcuts," accepts voice or text prompts to direct the editing process. The nearest market comparison is Adobe Premiere, which despite recent improvements remains a tool built for trained editors, not communications generalists.

Fonn Group, which makes the **Mimir** cloud-native MAM and production platform and the **Saga** storytelling and newsroom platform, builds from the editorial problem backward. Rather than starting with infrastructure and asking what can be built on top, they start with the people who need to use video material to create and tell a story.

Hiscale is another company that has the right idea. Why should a client have to make the decision to go to the cloud or stay on premises with the solution. Hiscale **FLICS** can be deployed as an elastic “swarm” of media processing capacity wherever and however it best fits the business – in a server room, in the cloud, or as a hybrid solution that “bursts” when extra capacity is needed.

For enterprise organizations that outgrow a fixed on-premise capacity but are not ready to commit fully to the cloud, that flexibility removes what is often the deciding objection.



Iconik, a MAM under the **Backlight** umbrella, operates in adjacent territory to Mimir: Backlight reported that Iconik customers were managing 903 million assets across 324 PB of storage, a 50% increase in only one year.

More than one third of this data volume comes from companies not traditionally thought of as “media & entertainment” (studios, production, online media, broadcasters, sports)!

The Iconik data is impressive for Backlight itself – with a rapidly growing client base in the “enterprise video” space. But it also points to the overall trend of the “non-broadcast” marketplace expanding and organizations needing the right services and solutions. (*Source: Iconik 2026 Media Stats Report*)

Dalet Dalia, which won the NAB Best of Show Award from TV Tech, is a natural language interface on top of existing Dalet infrastructure. Users issue requests in plain English and the system executes against whatever assets and workflows are already in place. Matteo De Martinis, EVP of Product at Dalet, framed the strategic intent at NAB:

> *Dalet is bringing the power of enterprise media workflows to a much broader audience, from traditional broadcasters to sales, marketing, and brand teams that are now producing and managing content at scale.*
>
> *Matteo De Martinis, EVP of Product Management, Dalet* |
>
> Source: *https://dalet.com/news/dalia-agentic-ai-end-to-end-media-workflows-nab-show-2026*

Dalet Flex, the underlying MAM platform, competes with **Codemill Cantemo, Editshare MediaFlow, Iconik, Mimir**, and several other manufacturers. Dalet enters from a broadcast heritage, which means depth of workflow control and a steeper implementation curve than lighter-weight cloud-native alternatives. That tradeoff matters depending on where your organization is starting from.

The panel discussion at the Enterprise Video Strategies track reinforced this from the practitioner side. **Dave Pond**, Head of Production at LinkedIn News, described building a 50-person production organization over 10 years and offered a direct frame for evaluating tools.

> *How can we use AI tooling to get us 75% of the way and let our creatives actually be creative?*
>
> *Dave Pond, Head of Production, LinkedIn News* |
> *Source: NAB Enterprise Video Strategies panel*

That is not a broadcast engineering question, it is a business operations question.

John Lythe, Product Director for Enterprise Media at **Grass Valley**, made a related point in the same session about what enterprise video teams need to measure: "If we get this wrong, share prices move."

Business impact, not technical specification, is the metric that matters to this buyer. Vendors who understand that framing are building for the right buyer.

What This Means

For the enterprise buyer

Use the vendor's opening question as a filter. Ask explicitly how the platform has been deployed for non-broadcast organizations at your scale and request references from comparable clients.

Some sample questions to probe: Who approves published content in your system? How does a non-technical team member complete their first task without IT support? What does the platform do when a project runs outside normal timeline and budget parameters? Do you capture information relevant to our ERP system? Our project management tool?

Vendors with broadcast-native DNA are adapting their pitch to the corporate market. That adaptation is genuine in some cases and cosmetic in others. The tell is whether the vendor can describe your operating reality before describing their product.

What Varde Media Solutions brings

The enterprise buyer needs a translator between broadcast-grade technology and corporate operating reality. Vendors who have not bridged that gap still produce value, but only when the someone does the translation work. That is a service differentiation opportunity, not a limitation.

Mission Objective 2: Where Is the AI Story Heading?

The question going in: Just about every vendor has an AI pitch right now. Most of them are genuine, but some of them are theater. We wanted to understand which products had embedded AI into operational workflows in ways that provide measurable ROI.

What We Found

The most important AI observation from NAB 2026 did not come from a product demonstration. It came from an article in the NCS online magazine:

> *If your project folders are disorganized, your metadata inconsistent, and your high-value content lives in fragmented silos, layering machine learning on top will only accelerate the creation of duplicate files and mismanaged assets.*
>
> *Marco Stahl, Projective | Source: NAB Show Perspectives: Orchestrating without the chaos*

That perspective held up across every AI conversation across four days. The AI category had nearly double the exhibitor presence compared to the year before, with two dedicated AI Pavilions. (*Source: NAB Show 2026 AI Programming Overview, Sports Video Group*)

Sam Phillips, VP of Architecture, Strategy and Emerging Technologies at AMC Global Media, described the vendor evaluation dilemma at NAB 2026 plainly: the risk of spending three to six months selecting a platform only to find the underlying models have moved on. "That's really not a place we can afford to be," he said. (*Source: https://enginesofchange.ai/p/nab-2026-field-notes*)

The AI applications delivering real results in enterprise video right now fall into three categories.

Automated Metadata and Search

Imaginario AI analyzes video across fourteen layers (objects, people, actions, spoken word in 100-plus languages, emotions) and makes archives searchable without prior manual tagging. Their NAB session framing, "From Archive to Action," is accurate. The value is not generating new content; it is making existing content usable for the first time.

TwelveLabs launched **Pegasus** 1.5 at NAB, their first model to perform Time-Based Metadata Extraction, identifying temporal boundaries in video and extracting structured metadata to a customer-defined schema. They also launched Rodeo, an AI co-pilot that lets users find, edit, and assemble footage using natural language. (*Source: TwelveLabs NAB 2026 announcement, PRWeb*)

Imaginario is a turnkey service that you can point at an archive and receive searchable metadata with no integration work. TwelveLabs is a platform with an API and a partner ecosystem, built for organizations that want to embed video intelligence into custom workflows or existing MAM platforms. Mimir is a verified TwelveLabs partner, which is relevant for Varde clients building on Mimir as their MAM foundation.

An independent observer, Carlo De Marchis, known as "a Guy With a Scarf", at the NAB Streaming Summit captured the shift in how content archives are being treated:

> *Library is now a verb. You query it.*
>
> *Carlo De Marchis at NAB 2026 Streaming Summit*
>
> *Source: https://aguywithascarf.substack.com/p/10-things-to-consider-after-the-2026*

Workflow Automation and Routing

Telestream Vantage can now orchestrate AI services and at NAB they demonstrated captioning across 128 languages, automated quality control that surfaces only exceptions requiring human review, speech-to-text on content during ingest, and frame-level analysis detecting objects, logos, and compliance issues.

Telestream confirmed that they use on-premise AI models so that customer content is never used to train shared models, which addresses the single most common concern in enterprise AI conversations.

Vantage itself deploys on-premise, in the cloud, or hybrid and its transcoding capabilities compete against Hiscale, **Ateme**, and **AWS** Elemental, but these solutions do not – yet – include AI services orchestration.

Agentic Interfaces for Existing Workflows

Dalia won Best of Show perhaps because it represents something specific: AI that makes existing infrastructure more accessible, not AI that replaces it. The governance model is the important detail. Configurable guardrails and permissions granularity let organizations define where human review is required at the workflow level. Again, from Matteo De Martinis at Dalet:

> *With Dalia, we're bringing a consumer-grade AI experience into the heart of enterprise media operations. By unifying a conversational interface, orchestration, and media-aware agents, Dalia removes friction from complex workflows.*
>
> *Matteo De Martinis, EVP of Product Management, Dalet |*
>
> *Source https://dalet.com/news/commercial-availability-dalia-media-aware-agentic-ai-enterprise/*

What Separates Signal from Noise

The vendors with credible AI stories share three traits, the third one being the most important:

- They can name the exact process step their AI addresses, what goes in, what comes out, and where human review is still required.
- They can answer data questions: where does the model run, is customer content used for training, what are the residency options.
- And their AI is embedded in a production workflow, not offered as a separate tool that users must switch to.

Gary Schneider, Senior Staff Media Systems Engineer at LinkedIn, described their AI use precisely during the NAB Enterprise Video Strategies panel: *"AI tooling helps automate some of the building up of workflows that the teams need. That's where it's working for us."*

What This Means

For the enterprise buyer

Before evaluating any AI tool, answer two questions. Is your video library stored and accessible consistently enough for AI to have something to work with? And what specific step in your production or distribution process do you want AI to address?

The division that worked for LinkedIn is a useful model: AI handles the repeatable 75%, people apply judgment to the 25% that differentiates the content. That is the right operating model for 2026.

One caution: AI capability at NAB moved faster than most procurement cycles. Organizations that run six-month evaluations risk selecting a product against a baseline that has already shifted. Build evaluation criteria around outcomes and data handling requirements, not current feature lists.

What Varde Media Solutions brings

Data residency, model training practices, and on-premise deployment options are now standard line items in the enterprise sales conversation.

Clients in healthcare, financial services, and government have requirements that broadcast-native AI implementations frequently do not anticipate. Varde helps clients know the vendors' answers before you even raise the question.

Mission Objective 3: Are There New Integration Platforms Worth Knowing?

The question going in: The biggest operational problem we see across enterprise video clients is not bad tools. It is tools that do not communicate with each other. We wanted a current read on who is connecting those tools and how well they work in production.

What We Found

The integration and orchestration category was not among the most active on the floor, but this space is expanding. The platforms we looked at differ in design, target user, and deployment model, and those differences determine which one fits a given organization.

Ortana (Cubix)

Ortana aims to solve the installed-base problem. With over 165 pre-built connectors, it links legacy and modern systems without requiring a platform replacement. The target customer already has a substantial tool investment and no appetite for rip-and-replace. Cubix Connect deploys as a global enterprise service bus or as targeted micro-integrations. The tradeoff: Ortana rewards organizations with dedicated integration resources. The base product is not a self-service tool, but Ortana's edge is connector breadth and the new Connector application simplifies the process greatly.

Qibb

Qibb is built for teams that need automation but do not have an integration architect. Non-developers build workflows between tools using a visual, drag-and-drop interface. One reference customer described replacing "in-house middleware that was limiting how fast we could innovate." Qibb is cloud-native with on-premise agents available for infrastructure-level connections. The differentiator is user accessibility, not connector depth, and the cloud-only deployment may give some IT departments pause.

Embrace Pulse-IT

Embrace handles the seam between media production systems and the broader business. That is the layer most other orchestration tools skip. At NAB, they demonstrated a practical agentic workflow: A user requests in plain language that specific training videos be packaged and sent to a corporate streaming platform, and **Pulse-IT** handles search, compliance validation, and packaging end-to-end. The key design principle, from Embrace CPTO Eric Toulain:

> *The value of AI comes when it is embedded into orchestrated workflows with visibility, control, and accountability. A standalone capability does not deliver the same result.*
>
> *Eric Toulain, CPTO, Embrace | NAB Show 2026*

Embrace partners with many players in the ecosystem, including Hiscale, Mimir, Iconik, LucidLink, just to mention a few.

Embrace is also Varde's principal choice as for workflow integration and process automation, primarily due to the combination of media processing pedigree with a large set of pre-built connectors/adaptors – and a cost-predictable licensing model.

Norsk

Norsk automates live video pipeline decisions at scale. Operators describe what they want detected in plain language; Norsk's AI planning layer translates that into a real-time detection specification executed against a live stream, with autonomous source switching, recording triggers, and human override available throughout.

The primary use case is broadcast, but as enterprise organizations run more live internal events (town halls, training sessions, all-hands meetings) the same orchestration problems apply.

Notable competitors in this space include Matrox Origin and Embrace Pulse-IT for live-to-managed workflows.

MASV

MASV eliminates the manual handoff in large-file movement. New NAB integrations cover Iconik, **IBM** Cloud Object Storage, and **LucidLink** Connect, alongside existing connections to Mimir, Frame.io, Amazon S3, and Wasabi.

> *These partnerships represent a fundamental shift in how media teams experience file transfer. For too long, moving large assets at scale meant stepping outside your core workflow.*
>
> *Majed Alhajry, CTO, MASV*
>
> *Source: https://salestechstar.com/partner-management-channel-enablement/masv-expands-global-partner-ecosystem-at-nab-2026-to-accelerate-end-to-end-media-workflows/*

The architectural distinction from LucidLink and Suite Studios is important: MASV moves files between systems. LucidLink and Suite Studios make cloud storage appear as a local file system so files do not need to move at all. The right choice depends on whether the problem is transfer speed or access friction.

What This Means

For the enterprise buyer

Map your tool stack before evaluating any integration platform. Identify where handoffs happen manually today and what data is involved in each one. That map determines whether your problem is connectivity (Ortana, Embrace, Qibb), file movement (MASV), or file access (LucidLink, Suite Studios). Vendors will not always tell you which category your problem belongs to.

What Varde Media Solutions brings

The integration layer is where advisory differentiation now lives.

Configuring individual tools is becoming a commodity but understanding how a client's media stack connects to their broader business systems (HR platforms, project management, CRM, distribution channels) is a service that most vendors cannot provide from the inside.

Mission Objective 4: Where Is the Cloud-vs-On-Premise Conversation?

The question going in: Enterprise IT teams have been told the cloud is the destination. Many have well-founded concerns that the cloud-first narrative glosses over real costs and risks. We wanted to find credible hybrid and on-premise alternatives.

What We Found

The market has stopped arguing about which model wins. Both are getting better, and the decision has become a calculation rather than a conviction.

A significant signal was Backblaze winning the NAB Show Product of the Year Award in Cloud Computing and Storage for B2 Neo. Backblaze B2 is S3-compatible object storage priced competitively against AWS S3 Standard, which is often the “default choice” for many customers.

The two main competitors to Backblaze B2 in this cost tier are Wasabi, which also has no egress fees and Cloudflare R2. For large, stable video libraries accessed at moderate rates, both Backblaze and Wasabi are substantially cheaper than AWS at scale. For high-churn or short-retention workloads, the calculus shifts.

Axle AI organized the On-Prem ZONE in the NAB North Hall, consolidating a dozen on-premise and hybrid vendors. Their recent acquisition of the Portfolio DAM product line adds a large installed base across corporate, government, and institutional buyers. Some of the competitors in governance-sensitive on-premise MAM/PAM: EditShare MediaFlow, Projective Strawberry, and Codemill Cantemo.

OpenDrives Edge offers a hybrid path for storage: Distributed teams pull data from a central hub, cache locally, and work at LAN speeds without egress costs. Changes sync back automatically. Competitors in this architectural space include **SNS (Studio Network Solutions)** and **Quantum**, both expanding hybrid capabilities from established on-premise positions.

EditShare combines on-premise NVMe performance storage with cloud-based review and collaboration via MediaSilo, and their Analytical AI runs across both.

Suite Studios' S3 Native File Streaming, which noticeably powers the new **Frame.io Drive**, offers another model: Cloud storage that behaves like a local drive without migration or duplication.

The Data Handling Dimension

A third dimension of the storage decision became clear at NAB 2026: Where AI processing runs and who can access content being analyzed. For healthcare, financial services, legal, and government buyers, this is a regulatory demand, a procurement requirement, not a preference.

Telestream's confirmation that customer content is never used to train shared models, Projective's fully on-premise AI analysis, and Axle AI's continued on-premise focus are all direct responses to that requirement.

Gary Schneider at LinkedIn offered a caution about adopting immature infrastructure standards that applies equally here: *"I lived early adoption of 2110 and have the scars to prove it. The concepts are exciting, but the industry really has to get aligned on how we're going to be releasing some of this."*

What This Means

For the enterprise buyer

Total cost of ownership for storage, be it cloud, hybrid, or on-premise, must include operational costs such as egress, AI processing at scale, and compliance overhead. On-premise and hybrid architectures are not conservative choices. They are the right answer for a significant share of the enterprise market, and the available products in 2026 are substantially better than two years ago.

A practical decision sequence: Establish your data-handling requirements first. If your content includes protected health information, legally privileged material, or is subject to data residency regulations, those constraints narrow the field before you get to pricing.

Then model true total cost of ownership at your expected volume, including migration costs. The on-premise vs. cloud question should follow from that analysis, not precede it.

What Varde Media Solutions brings

Clients in regulated industries need a vendor partner who can demonstrate the full data flow for any proposed solution - where content goes, who can access it, and where AI processing occurs. Solution providers who can model that proactively, before the client's security team asks, are closing deals that others lose at the final stage.

What the Panel Said That the Vendors Did Not

The NAB Enterprise Video Strategies track panel, "From Corporate Video to In-House Studio: How Enterprises Are Becoming Media Machines" was very insightful, and we are grateful to Grass Valley and NAB for making it available online. Practitioners, not vendors, were on stage.

Note: this report draws on the panel conversations. Direct quotes from **Dave Pond, Gary Schneider, and John Lythe** are presented as recorded.

On Outcomes Before Tools

Every panelist gave the same unsolicited advice: Establish what you are trying to accomplish before choosing anything. Said John Lythe, Product Director for Enterprise Media from Grass Valley: *"Start with the outcome first. Work backwards, and then the tooling will follow."*

Nadya Rousseau, CEO of Alter New Media, writing about NAB 2026, reached the same conclusion independently: The organizations winning at content are winning at the system level. Operational discipline and infrastructure design, not individual tool selection, are the differentiating factors. (*Source:* Alter New Media NAB 2026 Recap)

On Authenticity as a Production Standard

The panel spent significant time on what Dave Pond called the authenticity spectrum. Audiences trust raw phone footage. They trust highly polished production. They do not trust what falls between them.

The practical implication for tool selection: Video/production quality is not an absolute standard. It is a brand-relative one. A corporate communications team needs content that fits the trust register of the message being delivered, not broadcast-quality production.

Spending on production infrastructure beyond that threshold does not improve business results.

> *You have 5 seconds to grab them. If they don't think you're authentic, they're not going to watch you.*
>
> *Dave Pond, Head of Production, LinkedIn News*

On Keeping Production In-House

> *When the world changed [during COVID], we had to shift our content strategy immediately. We wouldn't have been able to do that with an out-of-house team. My team was able to quickly pivot and go in a new direction.*
>
> *Dave Pond, Head of Production, LinkedIn News*

The panel's position was that institutional knowledge and creative direction stay in-house. Execution on specific formats or formats requiring specialist skill can be outsourced selectively. For technology decisions, the same logic applies: Organizations that understand their own requirements before vendor conversations get better outcomes. Vendors who lead with solutions before asking about requirements are a consistent warning sign.

Five Patterns That Ran Through All Four Days

1. The AI prerequisite is content that is already in order.

Every credible AI story at NAB 2026 depended on content that was tagged, accessible, and consistently described before the AI was introduced. Archives scattered across personal drives, shared folders, and disconnected platforms produced the same result in every demonstration: the AI had nothing useful to work with. The sequence is organize first, then automate.

Content Is Ready	Content Is Not Ready
• Stored in a central, accessible location • Ingested into a system in a format that AI can query • Organized with enough consistency to be indexed	• Stored on personal or local hard drives with no central index • Spread across platforms with no common ingest point • No shared folder logic or naming convention • Behind access controls or siloed systems that no workflow tool can query

2. The integration layer is where the real operational value lives.

Individual tools have become simultaneously more capable and more commoditized. The investment that creates durable competitive advantage is not in any single tool. It is in the layer that connects them and eliminates manual handoffs between them. Ortana, Qibb, Embrace, and Norsk each represent slightly different, yet sometimes overlapping, answers to the same operational problem.

3. Cloud storage economics have matured. The decision is now a calculation.

Backblaze B2's NAB award, Axle AI's on-premise zone, and OpenDrives' hybrid Edge approach together represent a storage market that has moved past ideology.

Enterprise buyers should model total cost of ownership (egress, AI processing, and compliance overhead included) before committing to any architecture. The answer depends on the workload, not on a general preference for cloud or on-premise.

Scenario 1: 1TB Stored, Low Access (Backup/Archive)

Assume: 1TB stored, 50GB egress/month, 100K GET requests, 10K PUT requests, no data deleted within 90 days.

Provider	Storage	Egress	API Costs	Total Monthly	Annual
Wasabi	$5.90	$0.00			
Backblaze B2	$6.00	$0.00*			
Bunny Storage	$10.00	$0.50			
Cloudflare R2	$15.00	$0.00			
Azure Blob Cool	$10.00	$4.35			
GCS Nearline	$10.00	$6.00			
Azure Blob Hot	$18.40	$4.35			
AWS S3 Standard	$23.00	$0.00**			
GCS Standard	$20.00	$6.00			

Scenario 2: 10TB Stored, Moderate Access (SaaS Application)

Assume: 10TB stored, 2TB egress/month, 5M GET requests, 500K PUT requests, some data churn.

Provider	Storage	Egress	API Costs	Total Monthly	Annual
Wasabi	$59.00	$0.00	$0.00	$59.00	$708.00
Backblaze B2	$60.00	$0.00*	$2.00	$62.00	$744.00
Bunny Storage	$100.00	$20.00	$0.00	$120.00	$1,440.00
Cloudflare R2	$150.00	$0.00	$4.07	$154.07	$1,848.84
Azure Blob Hot	$184.00	$174.00	$5.25	$363.25	$4,359.00
				$405.50	$4,866.00
				$444.50	$5,334.00

Scenario 3: 100TB Stored, Heavy Access (AI/Media Platform)

Assume: 100TB stored, 30TB egress/month, 50M GET requests, 5M PUT requests, heavy churn in hot data.

Provider	Storage	Egress	API Costs	Total Monthly	Annual
Wasabi	$590.00	$0.00	$0.00	$590.00	$7,080.00
Backblaze B2	$600.00	$0.00*	$20.00	$620.00	$7,440.00
Cloudflare R2	$1,500.00	$0.00	$40.70	$1,540.70	$18,488.40
Bunny Storage	$1,000.00	$300.00	$0.00	$1,300.00	$15,600.00
Azure Blob Hot	$1,840.00	$2,610.00	$52.50	$4,502.50	$54,030.00
AWS S3 Standard	$2,300.00	$2,610.00	$45.00	$4,955.00	$59,460.00
GCS Standard	$2,000.00	$3,600.00	$45.00	$5,645.00	$67,740.00

Source: LeanOps | [Cloud Storage Pricing 2026]

4. Vendors are trying to "consolidate" the creative stack.

Adobe is one example of how major manufacturers are working to expand their solution ecosystem. Or are they building walls?

Looking at **Adobe** specifically for a moment: Color Mode in Premiere Pro, Frame.io Drive, and Telestream's deeper Vantage-to-Adobe integration represent the most significant reduction in creative workflow friction in several years. For organizations already on Adobe Creative Cloud, the case for adding specialized editing tools is getting harder to make. For those not yet standardized on Adobe, the ecosystem now covers more of the production lifecycle than at any prior point.

For enterprises, What rarely gets stated plainly is that Adobe does not integrate well outside its own ecosystem. With anything. (Except itself, and even then not always very well at all). If you want to integrate, automate, or connect to just about anything outside of the Adobe universe, the number of components and custom-developed middleware will quickly become untenable for most.

Other major platform vendors are trying to do similar things but still presenting themselves as "open" and "partner friendly".

Support for MXL – the Media Exchange Layer protocols - is good and well, but as long as the "modularity" of the solution portfolio forces clients to buy more functionality than they really need, bringing with it more complexity than they want to deal with, we are only revisiting the proprietary silos of the 2000s where some manufacturers famously (and still do) refused to integrate with anyone's other than their own tech stack.

This is exactly why the Varde portfolio includes solutions that enable us to configure and build cross-system workflows that get things done from one end of the media value chain to the other.

5. The vendors who impressed us most asked before they pitched.

The consistent differentiator across every category was not feature depth or pricing. It was how vendors entered a conversation.

The best ones asked about the team, the current process, and the failure modes before opening a product deck.

That approach is a reliable selection signal: It tells you whether a vendor is solving your problem or selling their product.

A Note on OVPs vs. Content Factory

Platforms like Kaltura, Brightcove, and Panopto belong in the discussion because they have been omnipresent in the enterprise video landscape for close to two decades now.

To be clear, they solve a real problem and they do it well: Take video, encode it, host it, and deliver it to an audience through a managed CDN.

For organizations whose primary need is a reliable distribution endpoint, they are a reasonable answer to a narrow question. But the distribution endpoint is the last step in a much longer operational chain – the media value chain, and it is rarely where enterprise video programs break down.

The failure points are upstream: content that cannot be found after it is made, production processes that depend on specialists the organization does not have, approval workflows that exist in email threads, archives that grow without structure, and tools that do not connect to each other or to the business systems the organization already runs.

The Enterprise Video Content Factory addresses that full chain.

It is not a platform with a CDN. It is an operational model, implemented through a curated stack of purpose-fit tools, that covers how content gets made, managed, found, and delivered across the organization.

Because it is built from best-fit components and not from a single vendor's suite, it can adapt to how your organization works, not the other way around. Distribution is one output of the factory. It is not the factory.

Vendor Quick Reference

Vendor	Category	Enterprise Takeaway
Adobe	Creative Tools	Color Mode in Premiere, Frame.io Drive, and Firefly AI represent the largest single reduction in creative workflow friction in several years.
Axle AI	MAM / DAM	On-premise MAM with AI search and the acquired Portfolio DAM installed base; strongest fit for organizations with strict data-handling requirements.
Backblaze *	Cloud Storage	S3-compatible object storage at ~$6/TB/month; B2 Neo adds white-label capability for technology partners building their own storage offerings.
CuttingRoom*	Video editing and contribution	Browser-based video editing tool that requires no infrastructure or hardware. Integrations with MAM systems and storages. Easy distribution to outlets. Mobile companion app for live or recorded ingest.
Codemill	MAM / QC	MAM with AI quality control built in; live-to-VOD gap is shorter, and QC exceptions surface automatically rather than through manual review.
CREE8	IaaS	Cloud production infrastructure with virtual workstations and shared storage; NAB Product of the Year for Studio-in-A-Box and Unsegment Growing File Technology.
Cuez	Production	Rundown and production automation for structured live events; applies to town halls, executive broadcasts, and internal event production.
Dalet	MAM / AI	Dalia agentic AI (NAB Best of Show) sits on top of Dalet Flex; users issue plain-language requests and the platform executes multi-step media workflows.
EditShare *	Storage / MAM	On-premise NVMe storage with Analytical AI enrichment and MediaSilo for cloud review; the full stack runs without external AI processing.
Embrace *	Integration	Connects media production systems to business systems; agentic AI executes multi-step workflows end-to-end with full audit trail.
EVS	Broadcast AV	Live production infrastructure with flexible control room architecture; enterprise application is in-house studio builds at broadcast scale.
Fonn Group * **Mimir** **Saga**	MAM / Storytelling	Mimir (MAM) and Saga (storytelling) built from the editorial problem backward; Mimir is a Varde partner and a verified TwelveLabs integration.
Hiscale *	Transcoding / Workflow	Elastic, scalable transcoding engine that can be deployed in the cloud, on-premises or in a hybrid model.
Iconik (Backlight)	MAM	Cloud-native MAM at scale (903M assets under management at NAB 2026); included for competitive context. Varde has no commercial relationship with Backlight.
Imaginario AI	AI	Makes video archives searchable across 14 analysis layers without prior manual tagging; turnkey deployment with no MAM integration required.

Vendor	Category	Enterprise Takeaway
Marquis Broadcast	Integration	Media and metadata movement for Avid-centric environments; relevant where Media Composer is the production standard.
MASV	File Transfer	Eliminates the manual file-handoff step; new NAB integrations with Iconik, IBM Cloud, and LucidLink extend its reach across the media supply chain.
Norsk	Live Workflow	Plain-language AI control for live pipelines; relevant for enterprise live events as production scales beyond basic switching.
OpenDrives	Storage	Hybrid cloud-edge platform; distributed teams get LAN-speed access to centrally managed assets with no egress costs.
Ortana	Integration	165+ pre-built connectors for legacy and modern systems; organizations with complex installed bases avoid wholesale replacement.
Perfect Memory	DAM	Semantic DAM that links assets to business context; suited to large archives where reuse value is high but discoverability is low.
Projective	PAM	Strawberry 7 PAM runs AI analysis entirely on-premise; no customer content leaves the organization's own infrastructure.
Qibb	Orchestration	Visual, low-code workflow builder; non-technical teams automate multi-tool processes without dedicated integration resources.
Reuters Imagen	DAM / Distribution	Managed video library and distribution with AI-powered tagging; built for organizations managing rights-sensitive content at scale.
Ross Video	Broadcast AV	Production switchers and studio infrastructure; enterprise application is in-house live production facilities at professional scale.
Suite Studios *	Cloud Storage	S3 native file streaming makes cloud storage appear and behave as a local drive; powers Frame.io Drive with no migration required.
Telestream	Workflow / AI	Vantage embeds AI into production pipelines at the process level; customer content never used for model training.
VIDA	DAM	Cloud-native DAM for published content; browser-based with AI tagging, built for marketing and communications teams.
Vizrt	Production / AR	AI Keyer eliminates green screen for corporate video; direct applicability to Zoom rooms and in-house studio builds without physical set investment.
VSN Arena	DAM	Cloud-native DAM from a broadcast MAM vendor entering the enterprise market; designed for both broadcast operations and corporate media teams.

* Varde Media Solutions has partner relationships with Backblaze, CuttingRoom, EditShare, Embrace, Hiscale, Mimir (Fonn Group), and Suite Studios. Iconik and other companies are listed for competitive context. No vendor paid for inclusion or reviewed content prior to publication.

The Conclusion: The Technology Is Ready. The Strategic Work Is Not Optional.

Here is what consolidates everything across four days and in total around 30-40 vendors.

The tools to manage enterprise video at scale exist and work: making content findable, production accessible to non-specialists, and archives genuinely useful. Several of them won awards this week.

The hard part is not selecting the technology. It is the work that happens before selection.

> *"Ask yourself why. Why are you creating this content? And that should drive everything."*
>
> Dave Pond, Head of Production, LinkedIn News | NAB Enterprise Video Strategies panel

That question is where every enterprise video initiative should begin. Who produces content in your organization? For whom? Through what process, with what approval requirements? What happens to a video six months after it is made? Who needs to find it, and how will they know it exists?

Enterprise video purchases skip these questions. Organizations buy a platform because the vendor demo was impressive, or because a peer organization uses it, or because it was the only option IT could evaluate in the time available. Twelve months later they are back to the same operational problems, with a new tool in the mix.

NAB 2026 confirmed what Varde already believed: The market has more technology than it has operational clarity about how to use it. That gap is where the real work happens.

The vendors that earned attention this week share a design sensibility worth using as a selection standard: CuttingRoom, Fonn Group, Hiscale, EditShare and others all build technology to fit the people doing the work, not the other way around. They explain what they do in plain language. They ask about your situation before describing their product.

Apply this standard to your own evaluation process. Identify the problem before choosing a solution. Audit what you have and do before selecting a MAM. Map where content goes after it is produced before buying orchestration software. Determine your data handling requirements before committing to a storage architecture.

At Varde, this is the sequence we bring to every client engagement: We are a consultancy, reseller, and solutions builder focused exclusively on the Enterprise Video Content Factory infrastructure for non-broadcast organizations. We help clients build the operational foundation first, then design a technology stack that fits how their business works.

If any of what this report describes is relevant to what your organization is working through, we would like to have that conversation.

About This Report

This report was prepared following four days on the NAB Show 2026 exhibit floor, April 19-22, 2026.

Panel quotes are drawn from the NAB Enterprise Video Strategies track session "From Corporate Video to In-House Studio: How Enterprises Are Becoming Media Machines."

Market context and competitor references are sourced from publicly available industry coverage; sources are cited as hyperlinks throughout.

Vendor information is drawn from publicly available NAB 2026 announcements and on-floor conversations.

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