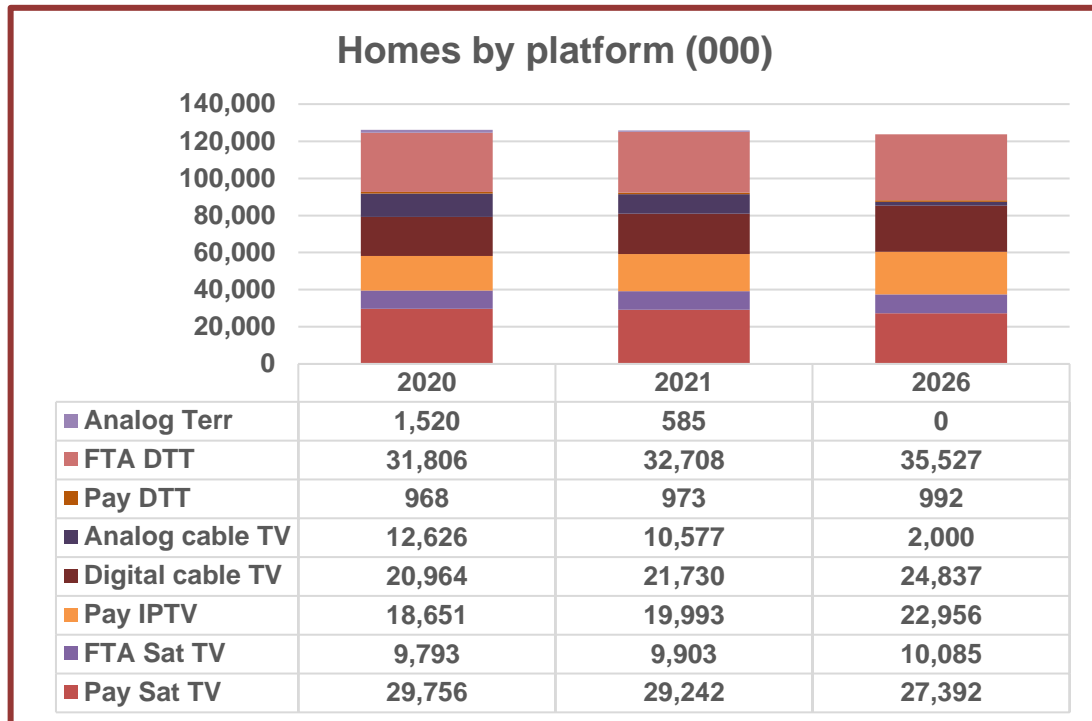


## Eastern Europe to add six million digital pay TV subs

Eastern Europe will lose nearly 5 million pay TV subscribers between 2020 and 2026 to take the total to 78.18 million. Not great - but not as bad as the US.



Simon Murray, Principal Analyst at Digital TV Research, said: “Most of the remaining analog cable TV subscribers are paying very little to receive very little. These homes are reluctant or unable to upgrade to more expensive digital pay TV.”

There were still 12.6 million analog cable subscribers by end-2020.

The number of digital pay TV subscribers will increase by nearly 6 million between 2020 and 2026 to 76 million.

Pay TV will be taken by 63% of the region’s TV homes in 2026; down from 66% in 2020. Digital pay TV penetration will climb from 56% to 62% over the same period.

# Eastern Europe Pay TV Forecasts

## Table of Contents

Published in April 2021, this 202-page PDF, PowerPoint and excel report comes in three parts:

- Insight: Detailed country-by-country analysis in a 76-page PDF document.
- Outlook: Forecasts for 22 countries in a 47-page PowerPoint document full of charts, graphs and bullet points;
- Excel workbook covering each year from 2010 to 2026 for 22 countries by household penetration, by pay TV subscribers, by pay TV revenues and by major operator. As well as summary tables by country and by platform;

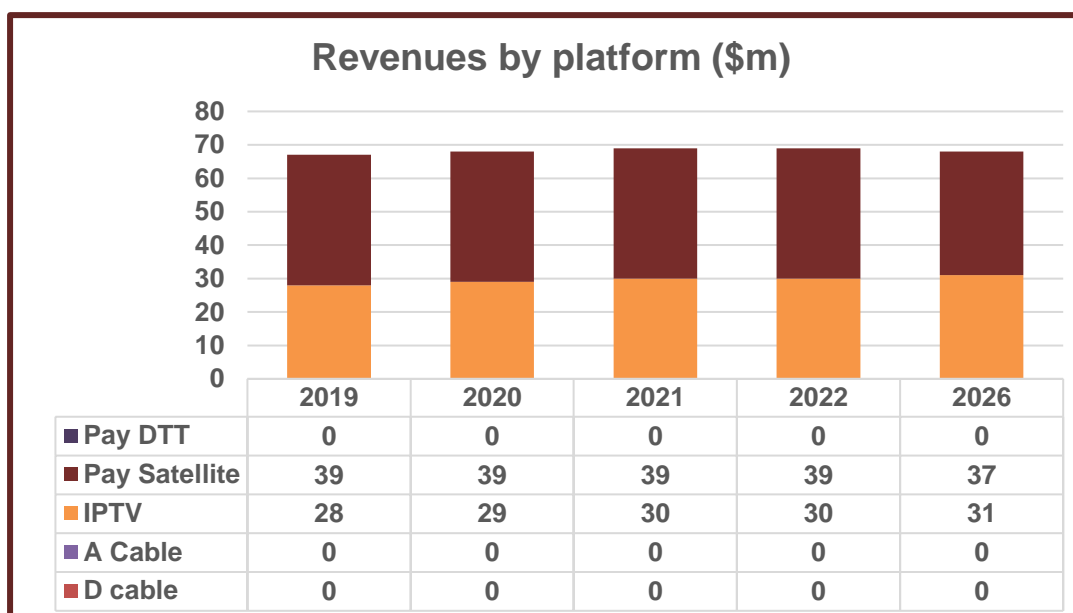
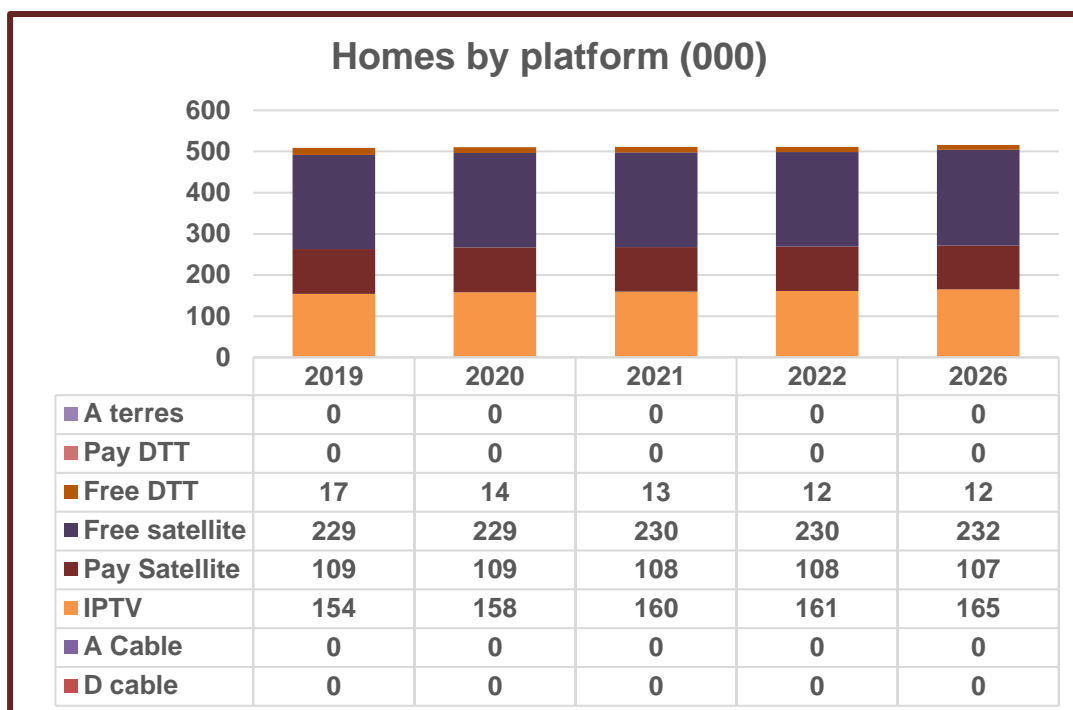
For more information, [please click here](#) or contact [lydia@digitaltvresearch.com](mailto:lydia@digitaltvresearch.com)

**Forecasts for the following 22 countries and 84 operators:**

Country	No of ops	Operators
Albania	3	Digitalb; Tring; Albtelecom
Belarus	3	MTIS, Zala, A1
Bosnia	3	Telemach, M:Tel; Total TV
Bulgaria	3	Bulsatcom, Vivacom, A1
Croatia	3	Max TV/T-HT, Evo, A1
Cyprus	3	Cytavision; Cablenet; Primetel
Czech Rep	5	Vodafone, O2, Telly, Skylink; T-Mobile
Estonia	3	Elisa; Telia; Home 3
Greece	3	Nova, Cosmote; Vodafone
Hungary	6	T-Home, Digi TV, Vodafone, Invitel, MinDig, Direct One
Latvia	3	Baltcom, Tet; Home 3
Lithuania	3	TEO, Cgates, Home 3
Macedonia	3	A1; Max TV; Total TV
Moldova	2	Sun; Moldtelecom
Montenegro	2	Total TV; CT
Poland	8	UPC, Vectra, Inea, Toya, TP/Orange, Cyfra Polsat, Canal Plus, Netia
Romania	5	RCS-RDS, Vodafone, Telekom Romania, Orange TV, Focussat
Russia	8	Akado, ER Telecom, MTS, Rostelecom, Beeline/Veon, NTV Plus, Tricolor, Orion
Serbia	2	SBB, Telekom Srbija
Slovakia	4	UPC, Skylink, Slovak Telekom; Orange TV
Slovenia	5	Telemach, Neo TV, Total TV, T-2, A1
Ukraine	4	Volia; Triolan; Ukrtelecom; Viasat

## SAMPLE: Qatar pay TV insight

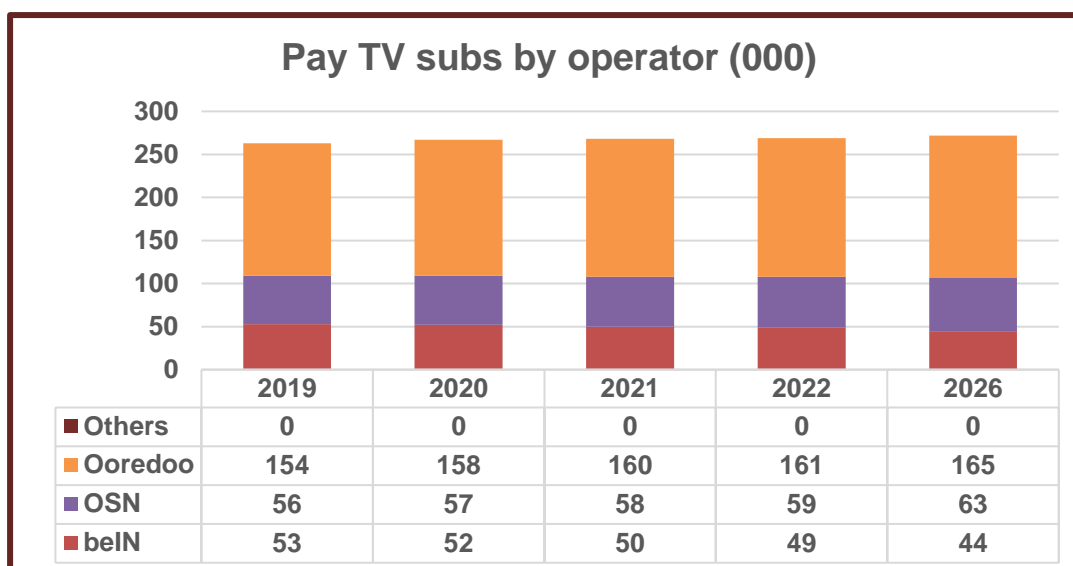
- **Digital TV penetration** reached 100% in 2015. About two-thirds of the 510,000 TV households receive either free-to-air or pay satellite TV signals.



### Main assumptions behind the forecasts

- About 45% of homes receive FTA satellite TV signals and 21% pay to receive satellite TV signals.
- IPTV penetration is also high – at 30.9% by end-2020.
- Few homes rely on DTT signals.

*Source: Digital TV Research*



- **Pay TV penetration** will remain at 52% of TV households. Pay TV revenues will reach \$68 million in 2026.

Main operators by subscribers (000)				
Operator	Pay TV subs	Fixed bb subs	Mobile subs	SVOD platforms
beIN	52	-	-	beIN Connect
Ooredoo	158	-	2,970	StarzPlay; OSN; beIN
OSN	57	-	-	OSN
Vodafone	-	5	1,678	-

*Source: Digital TV Research*

- The ongoing dispute between Saudi Arabia and Qatar hit beIN's subscriber numbers across the region. beIN is reliant on subscriptions outside Qatar to thrive. Most governments have followed the Saudi ban on beIN – although not all of them have enforced the ban that effectively. The ban started in mid-2017
- With 52,000 subs in Qatar by end-2020, **beIN** provides up to 67 channels. We forecast that beIN will have 44,000 subscribers by 2026 - falling as fewer sports rights are expected.
- We estimate 57,000 **OSN** subscribers by end-2020, with 63,000 by 2026. After a cost cutting drive and in preparation for an IPO in 2021, OSN is placing more emphasis on its SVOD platform. OSN has exclusive deals with seven Hollywood studios, but wants to increase Arabic content to at least a quarter of the total.
- **The Ooredoo TV IPTV platform** (up to 190 channels, including bundles from beIN, MBC and OSN) is offered as part of a triple-play package (up to 1Gbps). We estimated 158,000 subscribers at end-2020; climbing to 165,000 by 2026. In October 2015, Ooredoo has distribution deals with SVOD platforms OSN and StarzPlay (QAR30/month, 8,000 hours).

- Ooredoo is investing QAR1 billion on an **extensive fiber network** (up to 100Mbps). Ooredoo is responsible for constructing the government-owned National Broadband Network (QNBN). Ooredoo had 2.97 million mobile subscribers by September 2020.
- **Vodafone** won the license for the second fixed line service in April 2010. Vodafone sold its stake to a local consortium in late 2018. Vodafone started its Giga TV OTT platform in late 2019. Vodafone had 5,000 fixed broadband and 1.68 million mobile subscribers by September 2020.
- State-owned **Qatar Media Corporation**, owner of Al Jazeera and FTA channel Qatar TV, had upgraded the terrestrial network to DVB-T2 by December 2013. Full conversion took place in 2014.

## Qatar pay TV forecasts

	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026
Total households (000)																	
TV households (000)																	
Digital cable subs (000)																	
Analog cable subs (000)																	
Pay IPTV subscribers (000)																	
Pay Satellite TV subs (000)																	
Free-to-air Satellite TV HH (000)																	
Analog terrestrial hholds (000)																	
Primary FTA DTT hholds (000)																	
Primary Pay DTT hholds (000)																	
Digital homes (000)																	
Analog homes (000)																	
Pay TV subscribers (000)																	
Digital cable subs/TV HH																	
Analog cable subs/TV HH																	
Pay IPTV subs/TV HH																	
Pay Satellite TV/TV HH																	
Free-to-air Satellite TV/TV HH																	
Analog terrestrial/TVHH																	
Primary FTA DTT/TV HH																	
Primary pay DTT/TV HH																	
TVHH/Total HH																	
Digital/TV HH																	
Analog/TV HH																	
Pay TV Subs/TV HH																	
<i>Standalone dig cable subs (000)</i>																	
<i>Dual-play digl cable subs (000)</i>																	
<i>Triple-play dig cable subs (000)</i>																	
<i>Stand-alone pay IPTV subs (000)</i>																	
<i>Dual-play pay IPTV subs (000)</i>																	
<i>Triple-play pay IPTV subs (000)</i>																	
Revenues (US\$ million)																	
<i>Stand-alone digital cable revs</i>																	
<i>Dual-play digital cable TV revs</i>																	
<i>Triple-play digital cable TV revs</i>																	
Digital cable TV subs revenues																	
Digital cable TV on-demand revs																	
Digital cable TV revenues																	
Analog cable TV subs revs																	
Cable TV revenues																	



## Qatar pay TV forecasts

	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026
<i>Stand-alone IPTV revenues</i>																	
<i>Dual-play IPTV revenues</i>																	
<i>Triple-play IPTV revenues</i>																	
<i>IPTV subscription revenues</i>																	
<i>IPTV on-demand revenues</i>																	
<i>IPTV revenues</i>																	
<i>Satellite TV subscription revs</i>																	
<i>Satellite TV on-demand revs</i>																	
<i>Satellite TV revenues</i>																	
<i>DTT subscription revs</i>																	
<i>DTT on-demand revenues</i>																	
<i>DTT revenues</i>																	
<i>Subscription revenues</i>																	
<i>On-demand revenues</i>																	
<i>Total revenues</i>																	
<i>Average Revenue Per User (ARPU - US\$)</i>																	
<i>Stand-alone digital cable subs</i>																	
<i>Dual-play digital cable TV subs</i>																	
<i>Triple-play digital cable TV subs</i>																	
<i>Ave digital cable (subs &amp; VOD)</i>																	
<i>Analog cable TV subs</i>																	
<i>Stand-alone IPTV subs</i>																	
<i>Dual-play IPTV subs</i>																	
<i>Triple-play IPTV subs</i>																	
<i>Average IPTV (subs and VOD)</i>																	
<i>Pay Satellite TV (subs)</i>																	
<i>Pay Satellite TV (subs and PPV)</i>																	
<i>Pay DTT (subs)</i>																	
<i>Pay DTT (subs and PPV)</i>																	
<i>Average monthly ARPU</i>																	
<i>Pay TV subscribers by operator (000)</i>																	
<i>beIN (satellite)</i>																	
<i>OSN (satellite)</i>																	
<i>Ooredoo (IPTV)</i>																	
<i>Others</i>																	
<i>Share of pay TV subs by operator %</i>																	
<i>beIN (satellite)</i>																	
<i>OSN (satellite)</i>																	
<i>Ooredoo (IPTV)</i>																	
<i>Others</i>																	



## Qatar pay TV forecasts

	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026
<b>Subscription &amp; VOD revenues (US\$ million)</b>																	
beIN (satellite)																	
OSN (satellite)																	
Ooredoo (IPTV)																	
Others																	
<b>Share of pay TV revenues by operator %</b>																	
beIN (satellite)																	
OSN (satellite)																	
Ooredoo (IPTV)																	
Others																	
<b>Average Revenue Per User (ARPU - US\$)</b>																	
beIN (satellite)																	
OSN (satellite)																	
Ooredoo (IPTV)																	





## Digital TV Research publication schedule for 2021

	<b>Title</b>	<b>Publication</b>	<b>Price</b>
1	<a href="#">Africa Pay TV Forecasts</a>	January	£1200/€1320/\$1440
2	<a href="#">Africa OTT TV and Video Forecasts</a>	January	£1200/€1320/\$1440
3	<a href="#">Middle East &amp; North Africa Pay TV Forecasts</a>	January	£1200/€1320/\$1440
4	<a href="#">Middle East &amp; North Africa OTT TV and Video Forecasts</a>	February	£1200/€1320/\$1440
5	<a href="#">SVOD Platform Forecasts Update</a>	February	£800/€880/\$960
6	<a href="#">North America Pay TV Forecasts</a>	February	£600/€660/\$720
7	<a href="#">North America OTT TV and Video Forecasts</a>	February	£600/€660/\$720
8	<a href="#">Latin America Pay TV Forecasts</a>	March	£1200/€1320/\$1440
9	<a href="#">Latin America OTT TV and Video Forecasts</a>	March	£1200/€1320/\$1440
10	<a href="#">Asia Pacific Pay TV Forecasts</a>	March	£1200/€1320/\$1440
11	<a href="#">Asia Pacific OTT TV and Video Forecasts</a>	March	£1200/€1320/\$1440
12	<a href="#">Eastern Europe Pay TV Forecasts</a>	April	£1200/€1320/\$1440
13	Eastern Europe OTT TV and Video Forecasts	April	£1200/€1320/\$1440
14	Western Europe Pay TV Forecasts	April	£1200/€1320/\$1440
15	Western Europe OTT TV and Video Forecasts	April	£1200/€1320/\$1440
16	Global OTT TV & Video Forecasts	May	£1800/€1980/\$2160
17	Global SVOD Forecasts	May	£1600/€1760/\$1920
18	Global Pay TV Subscriber Forecasts	May	£1600/€1760/\$1920
19	Global Pay TV Revenue Forecasts	May	£1600/€1760/\$1920
20	Global Pay TV Operator Forecasts	June	£1600/€1760/\$1920
21	Global AVOD Forecasts	June	£1600/€1760/\$1920
22	Africa SVOD Forecasts	August	£1000/€1200/\$1300
23	Middle East & North Africa SVOD Forecasts	August	£1000/€1200/\$1300
24	Asia Pacific SVOD Forecasts	August	£1000/€1200/\$1300
25	Latin America SVOD Forecasts	September	£1000/€1200/\$1300
26	North America SVOD Forecasts	September	£500/€600/\$650
27	Eastern Europe SVOD Forecasts	September	£1000/€1200/\$1300
28	Western Europe SVOD Forecasts	October	£1000/€1200/\$1300
29	SVOD Forecasts Update	October	£1600/€1760/\$1920
30	Pay TV Forecasts Update	November	£1600/€1760/\$1920
31	SVOD Platform Forecasts Update	December	£800/€880/\$960

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