

# [Middle East & North Africa Pay TV Forecasts](#)

## Table of Contents

Published in February 2017, this 184-page PDF and excel report combines two of last year's reports: [Digital TV Middle East & North Africa Forecasts](#) and the relevant countries from [Middle East & Africa Pay TV Operator Forecasts](#) in one convenient place. The report comes in five parts:

- Executive summary and regional forecasts, with handy comparison tables to reveal the best growth prospects;
- Major pay TV operators, including market share for each;
- Regional forecasts summary from 2010 to 2022 by platform, by household penetration, by pay TV subscribers and by pay TV revenues;
- Country profiles for 25 territories;
- Detailed country forecasts for 20 countries.

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## Forecasts for the following 25 countries and 65 platforms:

Country	Forecasts	No of ops	Platform forecasts
<b>Afghanistan</b>			
<b>Algeria</b>	*	4	beIN; OSN; ART; Algerie Telecom
<b>Armenia</b>	*	0	
<b>Azerbaijan</b>	*	0	
<b>Bahrain</b>	*	4	beIN; OSN; ART; Batelco
<b>Egypt</b>	*	4	beIN; OSN; ART; Telecom Egypt
<b>Georgia</b>	*	2	Magtisar; Sliknet
<b>Iran</b>			
<b>Iraq</b>			
<b>Israel</b>	*	3	HOT; Yes; Partner
<b>Jordan</b>	*	4	beIN; OSN; ART; Orange
<b>Kazakhstan</b>	*	3	Alma; KT; Olau
<b>Kuwait</b>	*	3	beIN; OSN; ART
<b>Kyrgyzstan</b>			
<b>Lebanon</b>	*	3	beIN; OSN; ART
<b>Libya</b>			
<b>Morocco</b>	*	4	beIN; OSN; ART; Maroc Telecom
<b>Oman</b>	*	4	beIN; OSN; ART; Omantel
<b>Qatar</b>	*	4	beIN; OSN; ART; Ooredoo
<b>Saudi Arabia</b>	*	5	beIN; OSN; ART; Invision; eLife
<b>Syria</b>	*	3	beIN; OSN; ART
<b>Tunisia</b>	*	3	beIN; OSN; ART
<b>Turkey</b>	*	5	Turksat; Turkcell; TTNNet; Digiturk; D-Smart
<b>UAE</b>	*	5	beIN; OSN; ART; Du; eLife
<b>Uzbekistan</b>	*	2	Uztelecom; Uzdigital

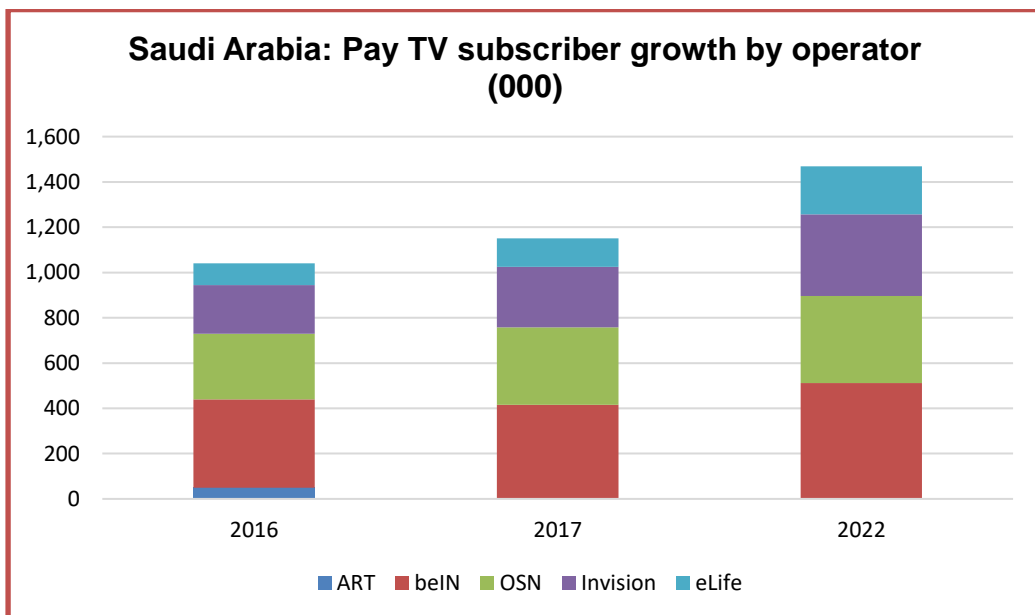
## SAMPLE: Saudi Arabia pay TV briefing

- Saudi Arabia achieved 100% **digital TV penetration** in 2015. About [REDACTED] TV households **receive satellite signals**, with the vast majority taking free-to-air channels. Despite IPTV growth, the pay TV penetration rate will only be [REDACTED] percentage points on 2016.

Main assumptions behind the forecasts	
[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]

*Source: Digital TV Research*

- **Pay TV revenues** will reach [REDACTED] (2022) will supply most of the pay TV revenues, although its share of the total will fall as IPTV ([REDACTED]) makes its mark.



- **Piracy** remains a major problem in the Kingdom.
- **beIN Sports** had [REDACTED] satellite TV subscribers in the Kingdom by end-2016, which we forecast will increase to [REDACTED] by 2022. beIN prices are \$10-31/month for 31-67 channels – including a lot of exclusive sport.
- **OSN** had about [REDACTED] residential satellite TV subscribers in Saudi Arabia by end-2016, with nearly [REDACTED] more expected to be added by 2022. With a total of 194 channels on offer, opening packages range from \$33-85/month for 53-90 channels.

- Satellite TV platform **Arab Radio and Television (ART)** is Saudi backed. Reports suggested that ART had as many as 1 million satellite TV subscribers across the Arabic-speaking countries, although the total fell after ART joined forces with former rival OSN.
- In March 2014, Saudi-based **Arabsat** ordered four more satellites; two to replace existing satellites and two to increase capacity. The satellites will launch in 2016 and 2017.

<b>Saudi Arabia: Fixed broadband subscribers (million)</b>							
	<b>2010</b>	<b>2011</b>	<b>2012</b>	<b>2013</b>	<b>2014</b>	<b>2015</b>	<b>9M16</b>
DSL	1.49	1.56	1.87	1.85	1.38	1.57	1.64
Wimax	0.20	0.30	0.55	0.80	1.20	1.50	0.90
Other	0.05	0.04	0.08	0.26	0.43	0.45	0.55
<b>Total</b>	<b>1.74</b>	<b>1.95</b>	<b>2.54</b>	<b>2.92</b>	<b>3.03</b>	<b>3.56</b>	<b>3.06</b>
HH penetration (%)	27.3	32.9	40.9	45.5	43.2	49.7	42.0
Mobile broadband	2.70	11.34	12.29	14.27	29.09	33.40	25.25
<i>Source: CITC</i>							

- **Fixed broadband penetration** reached 42% of households by September 2016 (3.06 million subs, but including wimax and leased lines). DSL subs numbers are falling, but the other category (which includes FTTH) is climbing.
- **Saudi Telecoms Company** is the largest telco (wireless and wireline) in the region. STC has an 18,000km FTTH network (100,000 subs by end-2012 – with an annual increase of 88% reported in 2013 (but no number given! We estimate 188,000)), which had passed 830,000 premises by end-2013 and wanted to pass 1.5 million by end-2014.
- As well as offering up to a 200Mbps broadband connection, STC launched its **Invision TV** service (including Abu Dhabi Sports and various OSN packages. However, the beIN channels were dropped) offered as part of a triple-play package) in August 2010. We estimate that Invision had [REDACTED] forecast by 2022.
- The Basic package provides 90 channels to triple-play subs. Variety has 23 channels for SAR85/month, with free and add-on packs also available. There are also 1,200 on-demand movies on offer. In September 2016, STC agreed to carry SVOD platform Starz Play (SAR7.50/week).
- Etihad Etisalat, parent of mobile operator Mobily, is investing in the **Saudi National Fiber Network**, which comprises 22,000km. The company had passed 530,000 homes with the fiber optic network by end-2013, with 700,000 more added in 2014.

- Trading as **eLife**, its fiber optic network offers various TV packs (including OSN and beIN Sports) and up to 200Mbps broadband speeds as part of triple-play bundles. We estimate that the company had [REDACTED] by 2022.
- **Etihad Atheeb**, trading as Go and 15% owned by Bahrain's Batelco, has 200,000 broadband subscribers (a mixture of wimax (up to 3Mbps) and FTTH (up to 200Mbps)) in 12 cities. Batelco states that the company lost 13% of its subscribers in 2015, having lost 28% in 2014. The company is yet to launch an IPTV service.
- Launched in June 2006, the five-channel **DTT** package reaches 90% of the population, although take-up has been limited. Up to 30 channels (including commercial ones) are eventually planned. Thomson Broadcast won the contract to update the network to DVB-T2 in 2014. Analog terrestrial switch-off took place in 2015.
- The Al Saud family has an iron grip on the country. However, the Kingdom has been subject to attacks from **militant Islamic fundamentalists**, who oppose Saudi Arabia's close ties to the US.
- **GDP per capita** was \$19,922 in 2016, according to the International Monetary Fund. GDP growth will be at the regional average in the next five years. Unemployment rates are fairly high.
- A strict adherent of Islam, **Saudi Arabia is the largest Gulf State**. Around 8.0 million of the 32.014 million population are expatriates. Riyadh has a population of 6.54 million, followed by Jeddah (4.16 million), Mecca (1.80 million), Ad-Dammam (1.09 million) and Medina (1.30 million).

## Saudi Arabia pay TV forecasts

	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022
Total households (000)													
TV households (000)													
Digital cable subs (000)													
Analog cable subs (000)													
Pay IPTV subscribers (000)													
Pay digital Satellite TV subs (000)													
Digital free Satellite TV HH (000)													
Analog Satellite TV HH (000)													
Analog terrestrial households (000)													
Primary FTA DTT households (000)													
Primary Pay DTT households (000)													
Digital homes (000)													
Analog homes (000)													
Pay TV subscribers (000)													
Total DTT homes (000)													
Digital cable subs/TV HH													
Analog cable subs/TV HH													
Pay IPTV subs/TV HH													
Pay Satellite TV/TV HH													
Digital free Satellite TV/TV HH													
Analog 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													
Total DTT/TVHH													
Stand-alone digital cable subs (000)													
Dual-play digital cable subs (000)													
Triple-play digital cable subs (000)													
Stand-alone pay IPTV subs (000)													
Dual-play pay IPTV subs (000)													
Triple-play pay IPTV subs (000)													



## Saudi Arabia pay TV forecasts

	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022
<b>Revenues (US\$ million)</b>													
<i>Stand-alone digital cable revs</i>													
<i>Dual-play digital cable TV revenues</i>													
<i>Triple-play digital cable TV revs</i>													
<b>Digital cable TV subs revenues</b>													
<b>Digital cable TV on-demand revs</b>													
<b>Digital cable TV revenues</b>													
<b>Analog cable TV subs revs</b>													
<b>Cable TV revenues</b>													
<i>Stand-alone IPTV revenues</i>													
<i>Dual-play IPTV revenues</i>													
<i>Triple-play IPTV revenues</i>													
<b>IPTV subscription revenues</b>													
<b>IPTV on-demand revenues</b>													
<b>IPTV revenues</b>													
<b>Satellite TV subscription revenues</b>													
<b>Satellite TV on-demand revenues</b>													
<b>Satellite TV revenues</b>													
<b>DTT subscription revs</b>													
<b>DTT on-demand revenues</b>													
<b>DTT revenues</b>													
<b>Subscription revenues</b>													
<b>On-demand revenues</b>													
<b>Total revenues</b>													
<b>Average Revenue Per User (ARPU \$)</b>													
<i>Stand-alone digital cable subs</i>													
<i>Dual-play digital cable TV subs</i>													
<i>Triple-play digital cable TV subs</i>													
<b>Average digital cable (subs &amp; VOD)</b>													
<b>Analog cable TV subs</b>													
<i>Stand-alone IPTV subs</i>													
<i>Dual-play IPTV subs</i>													
<i>Triple-play IPTV subs</i>													
<b>Average IPTV (subs and VOD)</b>													
<b>Pay Satellite TV (subs)</b>													
<b>Pay Satellite TV (subs and PPV)</b>													
<b>Pay DTT (subs)</b>													
<b>Pay DTT (subs and PPV)</b>													
<b>Average monthly ARPU</b>													



## Saudi Arabia pay TV forecasts

	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022
<b>Pay TV subs by operator (000)</b>													
ART (satellite)													
beIN (satellite)													
OSN (satellite)													
Invision (IPTV)													
eLife (IPTV)													
Others													
<b>Share of pay TV subs by operator %</b>													
ART (satellite)													
beIN (satellite)													
OSN (satellite)													
Invision (IPTV)													
eLife (IPTV)													
Others													
<b>Subscription &amp; VOD revs (US\$ mn)</b>													
ART (satellite)													
beIN (satellite)													
OSN (satellite)													
Invision (IPTV)													
eLife (IPTV)													
Others													
<b>Share of pay TV revs by operator %</b>													
ART (satellite)													
beIN (satellite)													
OSN (satellite)													
Invision (IPTV)													
eLife (IPTV)													
Others													
<b>Average Revenue Per User (ARPU - US\$)</b>													
ART (satellite)													
beIN (satellite)													
OSN (satellite)													
Invision (IPTV)													
eLife (IPTV)													
<i>Source: digital TV research</i>													





## Digital TV Research publication schedule for 2017

	<b>Title</b>	<b>Publication</b>	<b>Price</b>
1	<a href="#">Sub-Saharan Africa Pay TV Forecasts</a>	January	£1200/€1440/\$1560
2	<a href="#">Middle East &amp; North Africa Pay TV Forecasts</a>	February	£1200/€1440/\$1560
3	Asia Pacific Pay TV Forecasts	March	£1200/€1440/\$1560
4	Latin America Pay TV Forecasts	March	£1200/€1440/\$1560
5	North America Pay TV Forecasts	April	£750/€900/\$975
6	Eastern Europe Pay TV Forecasts	April	£1200/€1440/\$1560
7	Western Europe Pay TV Forecasts	May	£1200/€1440/\$1560
8	Global Pay TV Subscriber Forecasts	May	£1800/€2160/\$2340
9	Global Pay TV Revenue Forecasts	June	£1800/€2160/\$2340
10	Global Pay TV Operator Forecasts	June	£1800/€2160/\$2340
11	Global Pay TV Databook	July	£1000/€1200/\$1300
12	Sub-Saharan Africa OTT TV & Video Forecasts	August	£1200/€1440/\$1560
13	Middle East & North Africa OTT TV & Video Forecasts	August	£1200/€1440/\$1560
14	Asia Pacific OTT TV & Video Forecasts	September	£1200/€1440/\$1560
15	Latin America OTT TV & Video Forecasts	September	£1200/€1440/\$1560
16	North America OTT TV & Video Forecasts	October	£750/€900/\$975
17	Eastern Europe OTT TV & Video Forecasts	October	£1200/€1440/\$1560
18	Western Europe OTT TV & Video Forecasts	November	£1200/€1440/\$1560
19	Global OTT TV & Video Forecasts	November	£1800/€2160/\$2340
20	Global SVOD Forecasts	December	£1800/€2160/\$2340

Please note that the regional Pay TV reports (1-7 above) contain the content from last year's Digital TV series and the Pay TV Operator series – so two reports in one for 2017. Likewise, the regional OTT reports (12-18 above) contain the content from 2016's OTT series as well as the content from 2016's SVOD series.

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2	<a href="#">Digital TV Middle East &amp; North Africa Forecasts</a>	January	£900/\$1350/€1125
3	<a href="#">Digital TV Asia Pacific Forecasts</a>	March	£900/\$1350/€1125
4	<a href="#">Digital TV Latin America Forecasts</a>	March	£900/\$1350/€1125
5	<a href="#">Digital TV North America Forecasts</a>	March	£500/\$750/€625
6	<a href="#">Digital TV Eastern Europe Forecasts</a>	April	£900/\$1350/€1125
7	<a href="#">Digital TV Western Europe Forecasts</a>	April	£900/\$1350/€1125
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9	<a href="#">Digital TV World Revenue Forecasts</a>	May	£1300/\$1950/€1625
10	<a href="#">Digital TV World Databook</a>	May	£800/\$1200/€1000
11	<a href="#">Middle East &amp; Africa OTT TV &amp; Video Forecasts</a>	May	£900/\$1350/€1125
12	<a href="#">Asia Pacific OTT TV &amp; Video Forecasts</a>	June	£900/\$1350/€1125
13	<a href="#">Latin America OTT TV &amp; Video Forecasts</a>	June	£900/\$1350/€1125
14	<a href="#">North America OTT TV &amp; Video Forecasts</a>	June	£500/\$750/€625
15	<a href="#">Eastern Europe OTT TV &amp; Video Forecasts</a>	July	£900/\$1350/€1125
16	<a href="#">Western Europe OTT TV &amp; Video Forecasts</a>	July	£900/\$1350/€1125
17	<a href="#">Global OTT TV &amp; Video Forecasts</a>	July	£1500/\$2250/€1875
18	<a href="#">Asia Pacific Pay TV Operator Forecasts</a>	August	£900/\$1350/€1125
19	<a href="#">Middle East &amp; Africa Pay TV Operator Forecasts</a>	August	£900/\$1350/€1125
20	<a href="#">Latin America Pay TV Operator Forecasts</a>	August	£900/\$1350/€1125
21	<a href="#">North America Pay TV Operator Forecasts</a>	September	£500/\$750/€625
22	<a href="#">Eastern Europe Pay TV Operator Forecasts</a>	September	£900/\$1350/€1125
23	<a href="#">Western Europe Pay TV Operator Forecasts</a>	September	£900/\$1350/€1125
24	<a href="#">Global Pay TV Operator Forecasts</a>	October	£1500/\$2250/€1875
25	<a href="#">Middle East &amp; Africa SVOD Forecasts</a>	October	£900/\$1350/€1125
26	<a href="#">Asia Pacific SVOD Forecasts</a>	October	£900/\$1350/€1125
27	<a href="#">Latin America SVOD Forecasts</a>	November	£900/\$1350/€1125
28	<a href="#">North America SVOD Forecasts</a>	November	£500/\$750/€625
29	<a href="#">Eastern Europe SVOD Forecasts</a>	November	£900/\$1350/€1125
30	<a href="#">Western Europe SVOD Forecasts</a>	December	£900/\$1350/€1125
31	<a href="#">Global SVOD Forecasts</a>	December	£1500/\$2250/€1875

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