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Satellite Pay TV in the Arab World: KPIs and Projections

**Arab Advisors Group
Media Strategic Research Service**

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Section I: Introduction

This report provides a detailed comparison of the major KPI's for the main satellite Pay TV providers that broadcast out of the Arab World. There are five satellite Pay TV providers that cater specifically to the Arab region, namely: **Orbit Showtime Network (OSN), beIN Sports, Abu Dhabi Sports, Al Majd and MyHD.**

The Arab Advisors Group expects the Pay TV market to continue to have a steady paced growth for the years 2014 - 2017. The Arab Advisors Group projects Pay TV's total market subscribers' base to grow at a CAGR of 12% between the years 2013 and 2017, totaling 18.8 million subscribers by end of 2017. We estimate total market revenues to grow at a CAGR of 11% for years (2013 - 2017) totaling US\$ 2.5 billion.

The Pay TV market in the Middle East lags behind Pay TV markets in other regions in terms of penetration rates. The low penetration rate is linked to piracy issues, as well as language and economic barriers.

With the entrance of MyHD, the number of Pay TV providers in the Arab World totaled five. The Arab Pay TV market still contains the ability of growth and can accommodate other players. The market is shifting from linear viewership to a tailored viewership, where the population can mould their viewing patterns according to their preferences. The state of the art technologies with the various features; HD TV, catch up TV, Video on Demand (VoD) and 3D TV, are transforming the TV viewing experience.

Section II: Key Performance Indicators and Projections for the Pay TV Market in the Arab World

In July 2009, Showtime Arabia and Orbit Group announced the merger of their Pay TV operations. Established in 1994, Orbit was the region's first digital Pay TV network, with a fully digital, multi-channel, multi-lingual, pay television service, while Showtime Arabia followed Orbit and launched its Pay TV services in 1996. On February 1, 2010, after approximately six months from its merger, **Orbit Showtime Network** launched its new brand name **OSN**. In January 2011, OSN announced the addition of five Arabic ART entertainment channels to its portfolio. By this deal, **The Arab Radio and Television Network (ART)** offered away all the remaining owned channels to OSN.

In 2005, **Al Jazeera Network** started launching Pay TV channels dedicated to sports. In November 2009, Al Jazeera signed a deal to purchase all the sport's content and channels and rights of broadcast of **The Arab Television and Radio Network (ART)**. In 2013, Al Jazeera reached twenty Pay TV channels broadcasting major sports events, leagues and championships. In August 2013, Al Jazeera won the exclusive rights to broadcast the English Premier League for the next three seasons (2013/2014, 2014/2015 and 2015/2016).

Starting 2014, Al Jazeera Sports rebranded to **beIN Sports**. According to Al Jazeera Network, the move seeks to unite its global sport channels under one name ahead of the 2014 World Cup in Brazil. beIN Sports broadcasts in the Middle East and North Africa (MENA), France, the United States, Indonesia, Hong Kong and the Philippines.

For its part, **Al Majd**, launched in 2003, includes four open channels and eight encoded channels, providing a variety of media subjects targeting Arab families.

As for **Abu Dhabi Sports**, the group of channels is owned by Abu Dhabi Media, which is headquartered in Abu Dhabi, UAE. In April 2010, Abu Dhabi Media announced the launch of its new six High Definition (HD) sports channels. The announcement was made after the company won exclusive rights to broadcast the English Premier League for the seasons of 2010/2011, 2011/2012 and 2012/2013.

MyHD launched in May, 2013, and is headquartered at Dubai Media City. MyHD provides 34 satellite channels of which 19 are HD. The launch of MyHD brings the total number of Pay TV players in the Arab World up to five by end of 2013.

It is noteworthy that in addition to satellite Pay TV services there are some cable TV providers that provide local cable services in several MENA countries such as Kuwait Cable Vision in Kuwait, Cablevision in Lebanon, STC in Saudi Arabia (Invision), Ooredoo in Qatar (Mosaic TV), and Etisalat (eVision) among others.

This report analyzes and compares the KPI's and channels of the five satellite Pay TV operators, namely: OSN, beIN Sports, Abu Dhabi Sports, Al Majd and MyHD. This section provides an estimation of the KPI's for the major pay TV providers in the Arab world for the years 2008 – 2017.

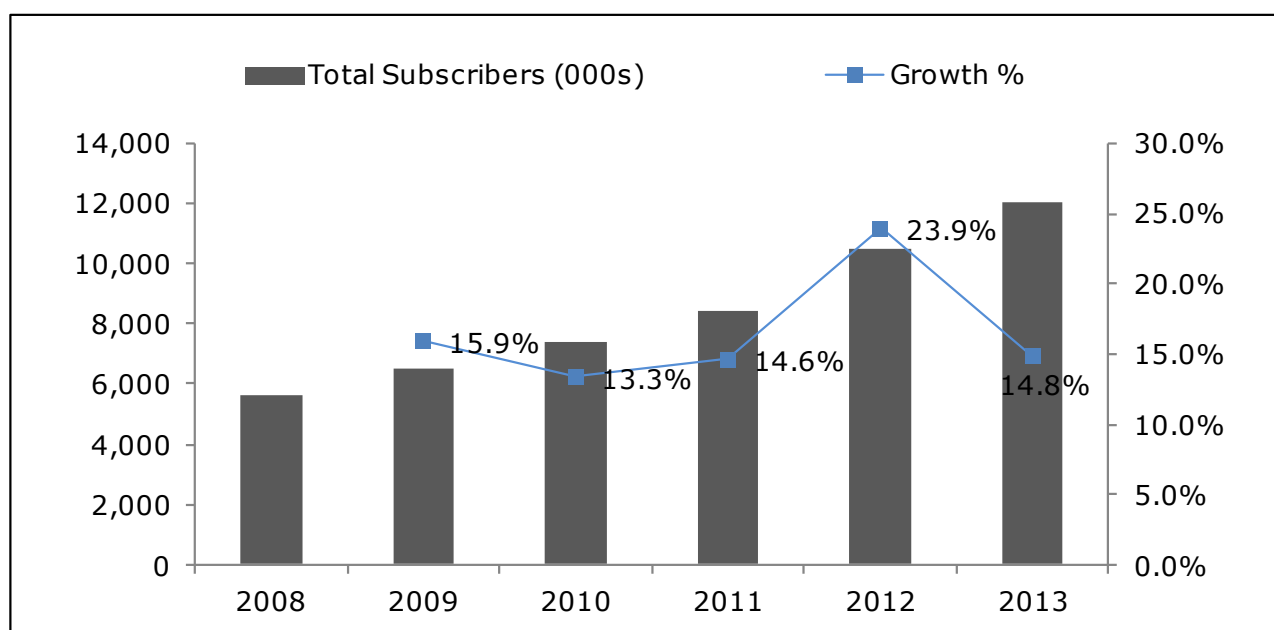
The Arab Advisors Group estimated Pay TV's total market subscribers' base to have grown at a CAGR of 17% between the years 2008 and 2013, to reach an estimated 12.041 million subscribers by end of 2013. OSN reported having 909,000 subscribers by end of 2013, a growth rate of 23.8% over the previous year. By end of 2013, beIN Sports had the highest estimated subscriber base with 10.687 million subscribers, depicting a 13.2% growth over 2012's estimated figure of 9.437 million subscribers.

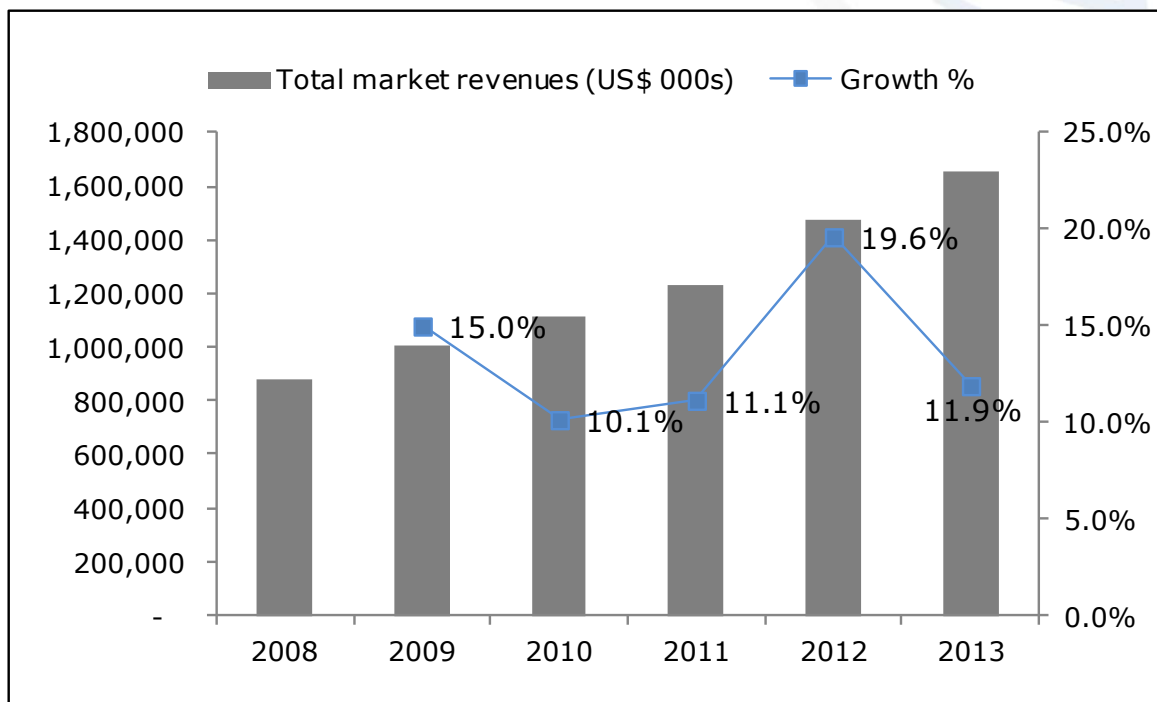
Total market revenues totaled an estimated US\$ 1.653 billion by the end of 2013. The Arab Advisors Group projected total Pay TV market revenues to grow at a CAGR of 14% between years (2008 - 2013). The Arab Advisors Group projected OSN and beIN Sports to register an ARPU of US\$ 48 and US\$ 9 respectively by end of 2013. For the year 2013, the Arab Advisors Group projected shares of 28.9% and 66.1% for OSN and beIN Sports respectively of total market revenues. The Arab Advisors Group estimates that by end of 2013, OSN had a market share of 7.5% of total market subscribers with an ARPU of US\$ 48. beIN Sports had an estimated 89% market share depicting the highest market share among the Pay TV operators, with an ARPU of US\$ 9 by end of 2013. Abu Dhabi Sports had a market share of 2.5%, with an ARPU of US\$ 18 by the end of 2013.

Exhibit 1: Pay TV Arab market estimated KPI's for years (2008 – 2013)

	2008	2009	2010	2011	2012	2013
Total market						
Subscribers (000s)	5,620	6,514	7,383	8,462	10,486	12,041
Added subscribers (000s)	-	894.286	869.048	1,078.205	2,024.176	1,555.000
Growth %	-	15.9%	13.3%	14.6%	23.9%	14.8%
Total market revenues (US\$ 000s)	877,540	1,009,024	1,111,290	1,235,064	1,477,161	1,652,878
Growth %	-	15.0%	10.1%	11.1%	19.6%	11.9%
OSN						
Subscribers (000s)	281.000	456.000	443.000	550.000	734.000	909.000
Added subscribers (000s)	-	175.000	-13.000	107.000	184.000	175.000
Growth %	-	62.3%	-2.9%	24.2%	33.5%	23.8%
OSN's market share %	5.0%	7.0%	6.0%	6.5%	7.0%	7.5%
Revenues (US\$ 000s)	179,592	245,000	277,000	300,575	382,605	477,384
Growth %	-	36.4%	13.1%	8.5%	27.3%	24.8%
% of total market revenues	20.5%	24.3%	24.9%	24.3%	25.9%	28.9%
ARPU (US\$)	56.00	54.33	51.42	50.00	49.08	48.00
beIN Sports						
Subscribers (000s)	5,282.800	5,993.143	6,718.833	7,657.692	9,437.143	10,687.143
Added subscribers (000s)	-	710.343	725.690	938.859	1,779.451	1,250.000
Growth%	-	13.4%	12.1%	14.0%	23.2%	13.2%
beIN Sports' market share %	94%	92%	91%	91%	90%	89%
Revenues (US\$ 000s)	683,369	747,870	797,496	877,693	1,027,678	1,092,336
Growth %	-	9.4%	6.6%	10.1%	17.1%	6.3%
% of total market revenues	77.9%	74.1%	71.8%	71.1%	69.6%	66.1%
ARPU (US\$)	11.33	11.00	10.41	10.12	9.93	9.00

	2008	2009	2010	2011	2012	2013
Abu Dhabi Sports						
Subscribers (000s)	-	-	147.667	169.231	209.714	294.714
Added subscribers (000s)	-	-	-	21.564	40.484	85.000
Growth%	-	-	-	14.6%	23.9%	40.5%
Abu Dhabi Sports' market share %	-	-	2.00%	2.00%	2.00%	2.45%
Revenues (US\$ 000s)	-	-	19,301	37,392	44,030	55,243
Growth %	-	-	-	93.7%	17.7%	25.5%
% of total market revenues	-	-	1.7%	3.0%	3.0%	3.3%
ARPU (US\$)	-	-	20.11	19.56	19.19	18.00
Al Majd and Others						
Subscribers (000s)	56.200	65.143	73.833	84.615	104.857	149.857
Added subscribers (000s)	-	8.943	8.690	10.782	20.242	45.000
Growth%	-	15.9%	13.3%	14.6%	23.9%	42.9%
Al Majd's market share %	1.00%	1.00%	1.00%	1.00%	1.00%	1.24%
Revenues (US\$ 000s)	14,579	16,154	17,493	19,404	22,848	27,914
Growth %	-	10.8%	8.3%	10.9%	17.7%	22.2%
% of total market revenues	1.7%	1.6%	1.6%	1.6%	1.5%	1.7%
ARPU (US\$)	22.73	22.05	20.87	20.30	19.92	18.00





Note: Abu Dhabi Sports launched its operations in 2010.

Source: Arab Advisors Group, Kipco Group

The Arab Advisors Group projects the total Pay TV market in the Arab World to reach 18.831 million subscribers by end of 2017. We believe that the Pay TV market will continue its trend of steady growth, and gain more popularity in the coming years. The Arab Advisors Group projects OSN and beIN Sport’s subscribers base to reach a total of 1.769 million and 15.987 million respectively by end of 2017.

Arab Advisors Group projects total Pay TV market revenues in the Arab World to reach US\$ 2.493 billion by end of 2017, up from an estimated US\$ 2.346 billion by end of 2016. OSN’s estimated market share of total estimated market revenues by end of 2017 is projected at 32% with US\$ 789.520 million. Moreover, Arab Advsors Group projects beIN Sport’s total revenues to reach US\$ 1.495 billion in 2017. Abu Dhabi Sports’ market share of total market revenues is projected at 3.8%.

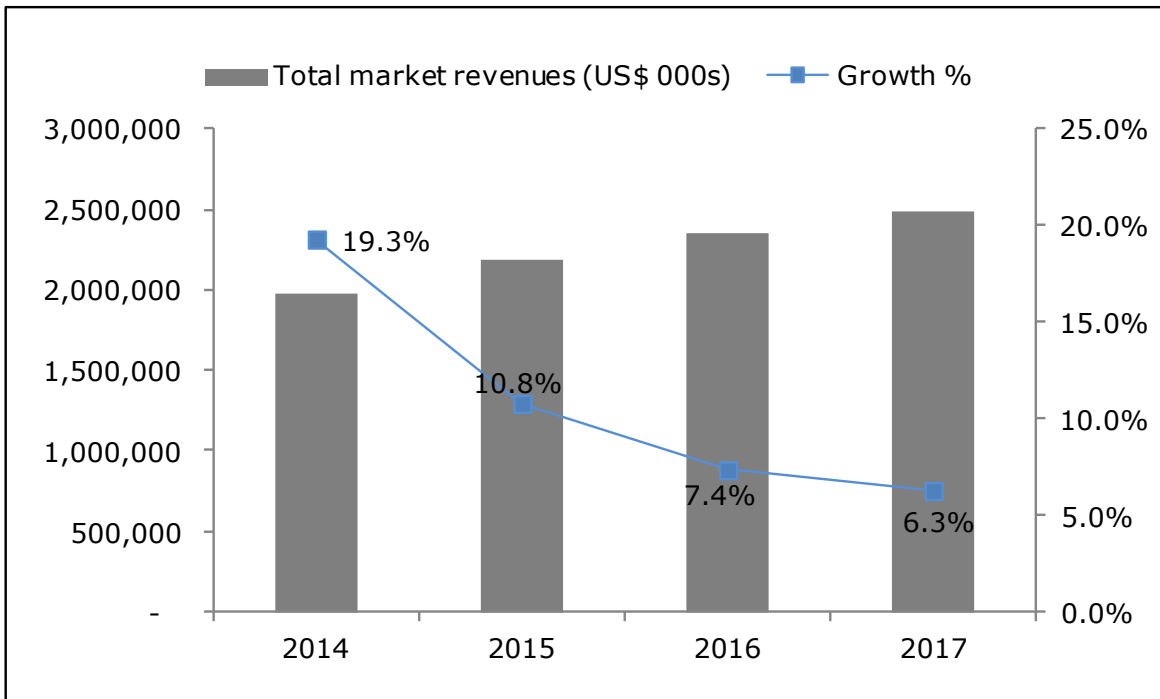
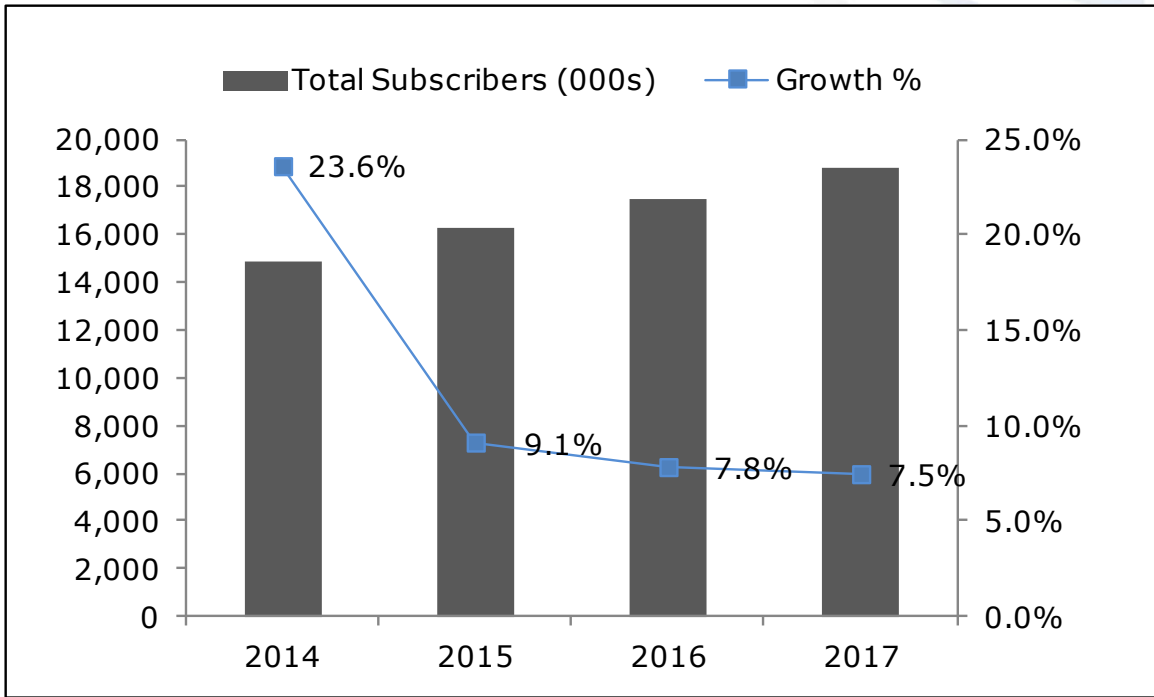
As for operators’ ARPU levels, Arab Advisors Group projects OSN’s market share of 9.4% of total market subscribers, and an ARPU of US\$ 40 by end of 2017. beIN Sports has an estimated market share 85% of total market subscribers, with an ARPU of US\$ 8. Abu Dhabi Sports had an estimated market share of 3.8%, with an ARPU of US\$ 16.8.

Arab Advisors Group projects continual drop of ARPU levels for all market players. OSN and beIN Sports’ ARPU are estimated at US\$ 40 and US\$ 8 respectively by end of 2017.

Exhibit 2 details projections of the major Pay TV market KPI’s for years (2014 – 2017).

Exhibit 2: Pay TV market in the Arab world projections (2014 - 2017)

	2014	2015	2016	2017
Total market				
Subscribers (000s)	14,886	16,246	17,521	18,831
Added subscribers (000s)	2,845.000	1,360.000	1,275.000	1,310.000
Growth %	23.6%	9.1%	7.8%	7.5%
Total market revenues (US\$ 000s)	1,971,883	2,184,811	2,345,626	2,493,092
Growth %	19.3%	10.8%	7.4%	6.3%
OSN				
Subscribers (000s)	1,109.000	1,319.000	1,539.000	1,769.000
Added subscribers (000s)	200.000	210.000	220.000	230.000
Growth %	22.0%	18.9%	16.7%	14.9%
OSN's market share %	7.5%	8.1%	8.8%	9.4%
Revenues (US\$ 000s)	561,568	645,612	724,836	798,520
Growth %	17.6%	15.0%	12.3%	10.2%
% of total market revenues	28.5%	29.6%	30.9%	32.0%
ARPU (US\$)	46	44	42	40
beIN Sports				
Subscribers (000s)	13,187.143	14,187.143	15,087.143	15,987.14
Added subscribers (000s)	2,500.000	1,000.000	900.000	900.000
Growth%	23.4%	7.6%	6.3%	6.0%
beIN Sports' market share %	89%	87%	86%	85%
Revenues (US\$ 000s)	1,300,461	1,400,339	1,452,790	1,495,166
Growth %	19.1%	7.7%	3.7%	2.9%
% of total market revenues	66.0%	64.1%	61.9%	60.0%
ARPU (US\$)	9	8.5	8.25	8
Abu Dhabi Sports				
Subscribers (000s)	394.714	494.714	594.714	714.714
Added subscribers (000s)	100.000	100.000	100.000	120.000
Growth%	33.9%	25.3%	20.2%	20.2%
Abu Dhabi Sports' market share %	2.65%	3.05%	3.39%	3.80%
Revenues (US\$ 000s)	73,265	92,918	111,972	132,603
Growth %	32.6%	26.8%	20.5%	18.4%
% of total market revenues	3.7%	4.3%	4.8%	5.3%
ARPU (US\$)	17.5	17.25	17	16.75
Al Majd and Others				
Subscribers (000s)	194.857	244.857	299.857	359.857
Added subscribers (000s)	45.000	50.000	55.000	60.000
Growth%	30.0%	25.7%	22.5%	20.0%
Al Majd's market share %	1.31%	1.51%	1.71%	1.91%
Revenues (US\$ 000s)	36,589	45,942	56,028	66,804
Growth %	31.1%	25.6%	22.0%	19.2%
% of total market revenues	1.9%	2.1%	2.4%	2.7%
ARPU (US\$)	17.5	17.25	17	16.75



Source: Arab Advisors Group, Kipco Group

Section III: Pay TV Trends in the Arab World

The Arab Advisors Group conducted major media surveys in Egypt, UAE and Iraq during 2013. The surveys probed media usage patterns in the three countries, including pay TV usage patterns and habits. The surveys give insights into the Pay TV consumption, regardless of whether the subscriptions are legitimate or pirated.

The surveys separately covered Egypt, UAE and Iraq. The surveys of Egypt, UAE and Iraq were conducted using Computer Assisted Telephone Interviews (CATI) with 749, 750 and 741 respondents, respectively. The survey samples' breakdown was pre-defined according to the official demographic breakdown in the three countries. The three surveys yield a confidence level of 99% with a margin of error of less than 5%.

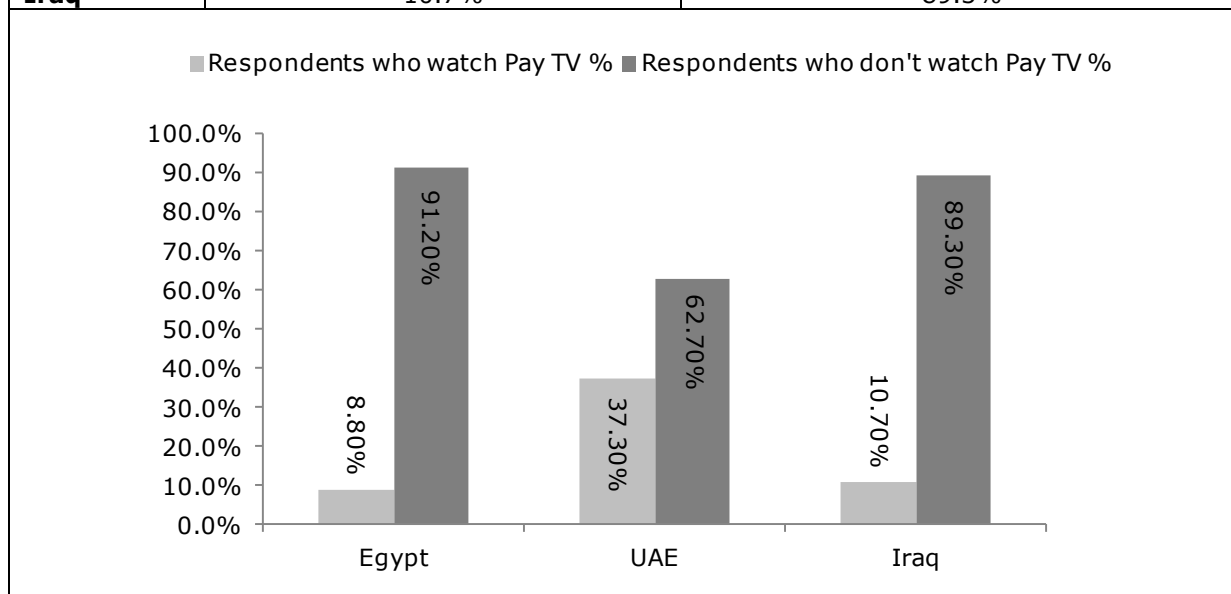
The survey reports which were the base of this section are listed below:

- **Egypt Media Survey 2013**
- **UAE Media Survey 2013**
- **Iraq Media Survey 2013**

Egypt, UAE and Iraq surveys probed the Pay TV viewing patterns of respondents who watch Pay TV at their home. **Exhibit 3** below reveals the percentage of Pay TV viewing in the three countries.

Exhibit 3: Pay TV viewing in Internet users households in Egypt, UAE and Iraq

Country	Respondents who watch Pay TV %	Respondents who don't watch Pay TV %
Egypt	8.8%	91.2%
UAE	37.3%	62.7%
Iraq	10.7%	89.3%



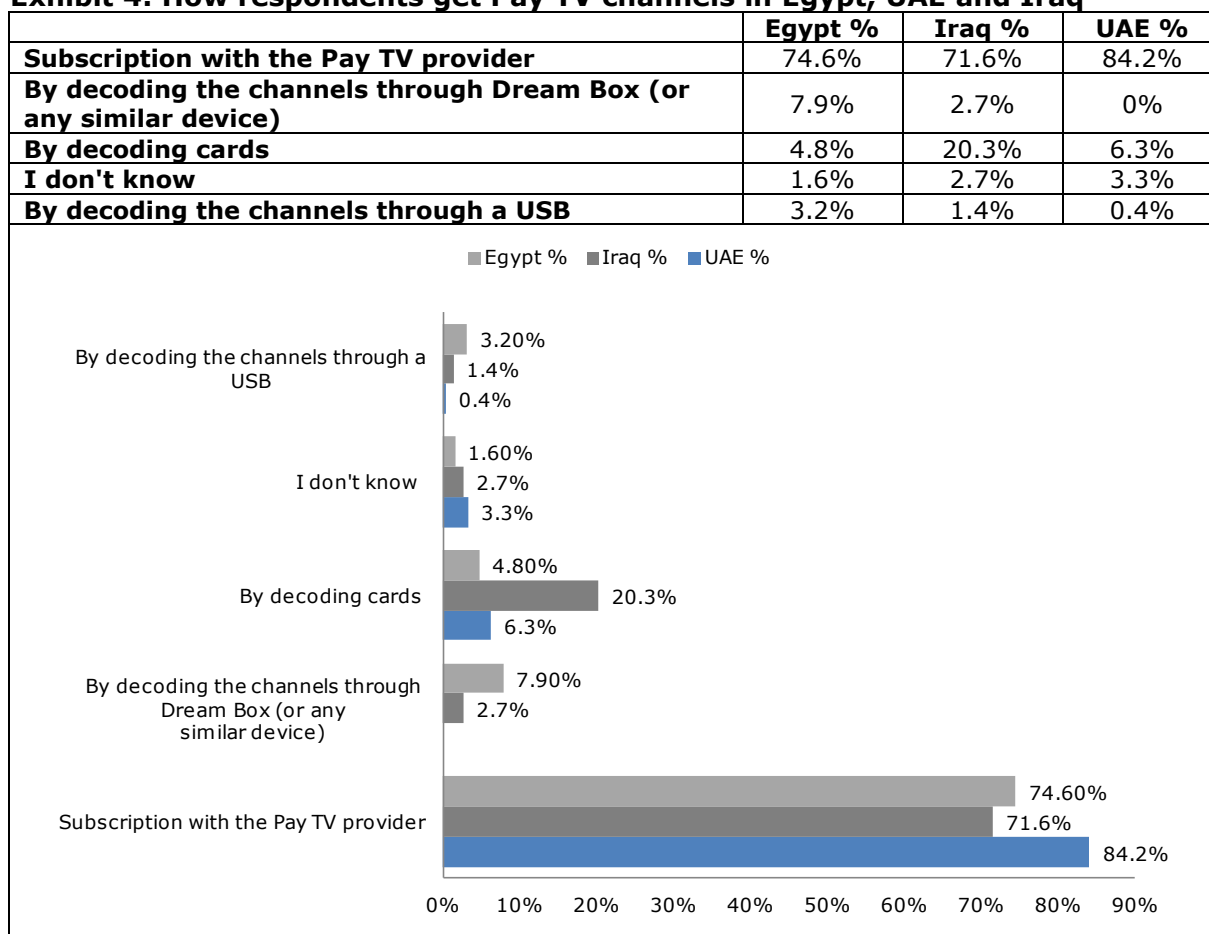
Note:

- Percentages for Egypt are calculated from the 718 respondents who watch TV
- Percentages for UAE are calculated from the 643 respondents who watch TV
- Percentages for Iraq are calculated from the 692 respondents who watch TV

Source: Arab Advisors Group's, Egypt Media Survey of Internet Users 2013, UAE Media Survey of Internet Users 2013, Iraq Media Survey of Internet Users 2013

The Media survey conducted in Egypt revealed that 74.6% of individuals, who watch Pay TV channels, watch them through a subscription with a Pay TV provider. Meanwhile, 3.2% reported watching the Pay TV channels by decoding them through a USB. It is noteworthy that 7.9% of respondents in Egypt get their Pay TV channels through DreamBox. The UAE Media survey findings show that almost 84.2% of respondents who watch Pay TV in the country have a subscription with a Pay TV provider. Meanwhile, 0.4% of these respondents reported watching it by decoding the channels through a USB. In Iraq, only 2.7% of respondents who watch Pay TV get pirated Pay TV channels using decoding devices; such as DreamBox. Moreover, 71.6% stated that they watch Pay TV channels through their subscription with one of the Pay TV providers. **Exhibit 4** details further.

Exhibit 4: How respondents get Pay TV channels in Egypt, UAE and Iraq



Note:

- Percentages for Egypt are calculated from the 63 respondents who watch Pay TV
- Percentages for UAE are calculated from the 240 respondents who watch Pay TV
- Percentages for Iraq are calculated from the 74 respondents who watch Pay TV

Source: Arab Advisors Group's, Egypt Media Survey of Internet Users 2013, UAE Media Survey of Internet Users 2013, Iraq Media Survey of Internet Users 2013

Section IV: The Arab Pay TV Landscape – A Comparison

This section compares the channels of the five Pay TV providers; OSN, beIN Sports, Abu Dhabi Sports, Al Majd and MyHD.

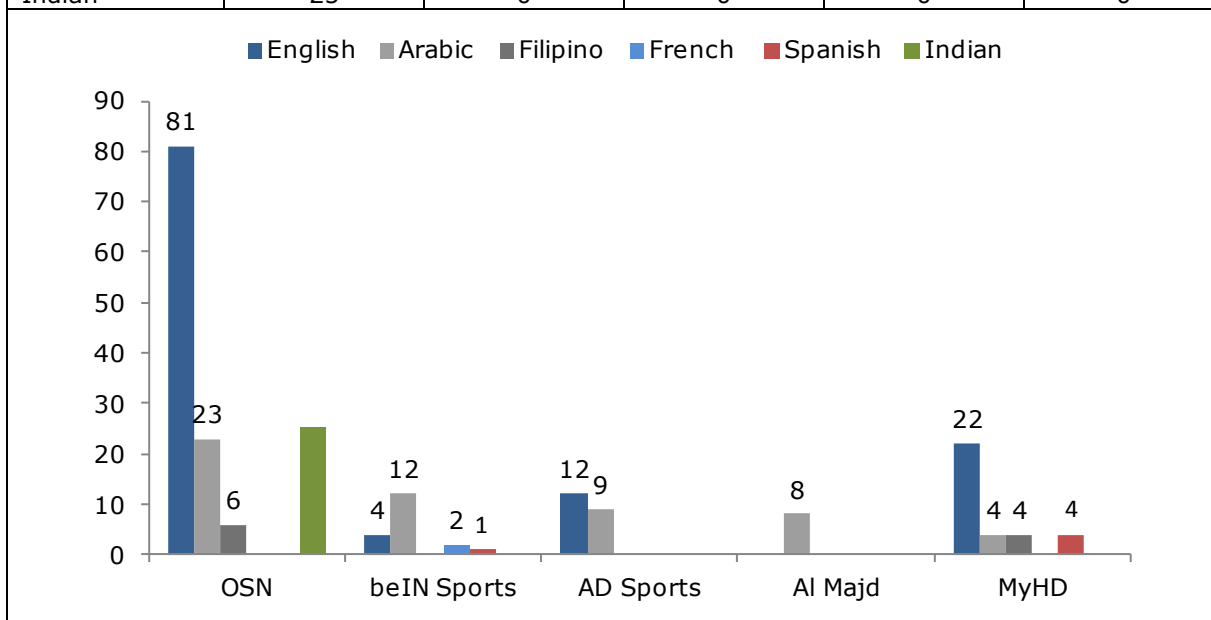
Channels

By February 2013, OSN (Orbit Showtime Network), beIN Sports, Abu Dhabi Sports, Al Majd and MyHD offered a total of 218 Pay TV channels. OSN had the highest number of channels with 136 channels (including the 3 pay-per-view channels and On Demand channel), Abu Dhabi Sports and beIN Sports followed, with 21 and 19 channels respectively, while Al Majd TV provided 8 encoded channels.

Pay TV channels differ from free-to-air channels in terms of programming. Pay TV channels are more specialized in movies, series, entertainment, music, sports or children programming. OSN had the highest number of English channels with 81 channels by February 2013. **Exhibit 5** below illustrates the proportion of Arabic, English Filipino French Spanish and Indian channels on the five networks.

Exhibit 5: Total number of channels by language Change (By February 2014)

Language	OSN	beIN Sports	AD Sports	Al Majd	MyHD
English	81	4	12	0	22
Arabic	23	12	9	8	4
Filipino	6	0	0	0	4
French	0	2	0	0	0
Spanish	0	1	0	0	4
Indian	25	0	0	0	0



Note: OSN On Demand HD channel provides shows in both Arabic and English.

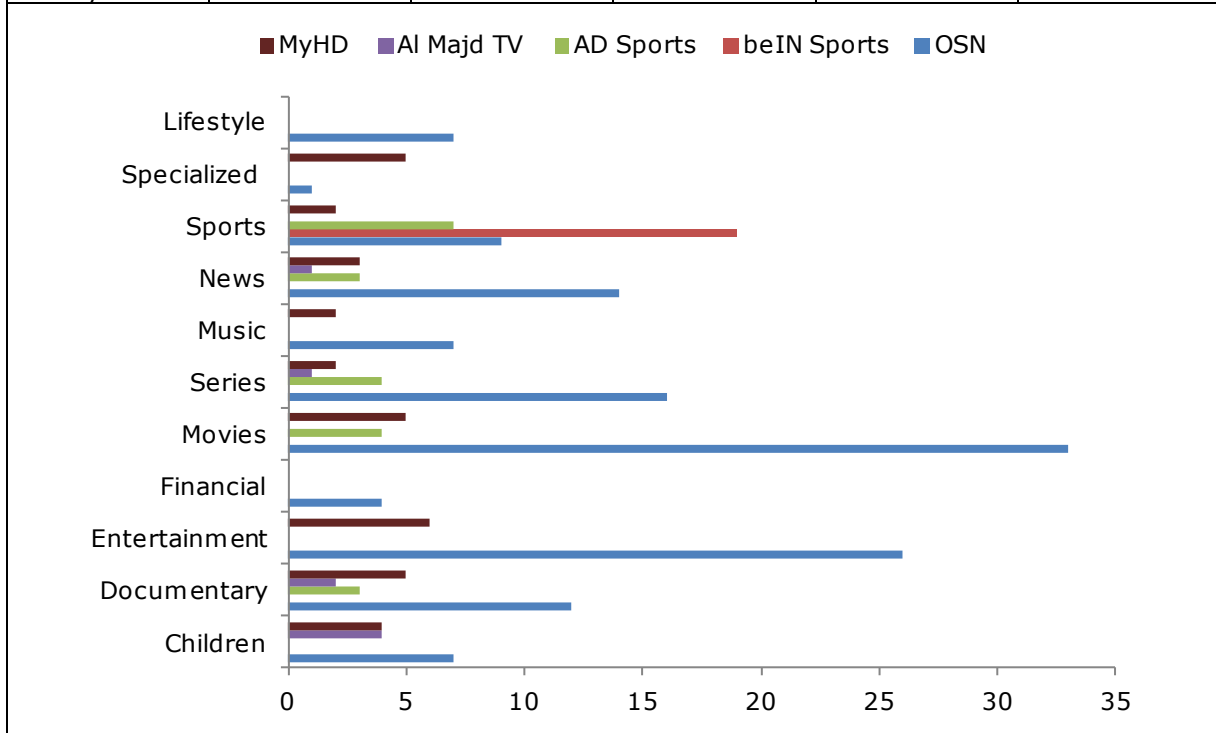
Source: OSN – Orbit Showtime Network, ADTV Network, Al Jazeera Network, Al Majd, MyHD

Exhibit 6 shows the different types of channels available on the five Pay TV providers' networks. Among the five, beIN Sports had the highest number of sports channels (19), followed by OSN and Abu Dhabi Sports with 9 and 7 sports channels respectively. OSN had 33 movie channels while Abu Dhabi Sports had 4 channels.

OSN also takes the lead in the number of series, documentary, and lifestyle channels with 16, 12, and 7, respectively.

Exhibit 6: Total numbers of different types of channels (By February 2014)

Type	OSN	beIN Sports	AD Sports	Al Majd TV	MyHD
Children	7	0	0	4	4
Documentary	12	0	3	2	5
Entertainment	26	0	0	0	6
Financial	4	0	0	0	0
Movies	33	0	4	0	5
Series	16	0	4	1	2
Music	7	0	0	0	2
News	14	0	3	1	3
Sports	9	19	7	0	2
Specialized	1	0	0	0	5
Lifestyle	7	0	0	0	0



Source: OSN – Orbit Showtime Network, ADTV Network, Al Jazeera Network, Al Majd, MyHD

Section V: OSN – Orbit Showtime Network

In July 2009, Showtime Arabia and Orbit Group, two major Pay TV providers in the Arab World, announced the merger of their Pay TV operations. The newly formed company is owned by "Panther Media Group Ltd", a company registered in Dubai International Financial Centre (DIFC). The joint venture is an equal partnership between Orbit Group, a member of the Riyadh-based Mawarid Group, and Showtime Arabia, a subsidiary of Kuwait-based KIPCO. As a result of the merger, a wide variety of Arabic and international premium entertainment channels are now available for Pay TV subscribers.

The merger of the two Pay TV providers includes the two core network operations except for Orbit Group's Media Gates, Orbit Data Systems and Noorsat. These operations are not part of the merger and continue to be managed by their respective management teams independent of the newly formed company.

On February 1, 2010, after approximately six months from its merger, Orbit Showtime Network launched its new brand name (OSN). In December 2010, OSN launched the Showbox HD. Showbox HD is a Digital Video Recorder that is High Definition (HD) and 3D ready. The showbox has a digital storage capacity of 500GB and approximately 450 hours of standard definition or 170 hours of HD content.

OSN channels

By February 2014, OSN encompassed 136 channels with various types. Channel types offered by OSN include: movies, series, sports, Arabic, kids, entertainment, news, documentaries and music. **Exhibit 7** below details OSN channels.

Exhibit 7: OSN channel list (By February 2014)

Channel	Channel Type	Language
OSN Channels		
OSN Box Office 1	Pay per view	English
OSN Box Office 2	Pay per view	English
OSN Box Office 3	Pay per view	English
OSN Movies HD	Movies	English
OSN Movies HD+2	Movies	English
OSN Action HD	Movies	English
OSN Premier	Movies	English
OSN Premier+2	Movies	English
OSN Cinema	Movies	English
OSN Cinema+2	Movies	English
OSN Movies Action	Movies	English
OSN Movies Comedy HD	Movies	English
OSN Movies Kids	Movies	English
OSN Movies Drama	Movies	English
OSN Movies Drama +2	Movies	English
OSN Movies Festival	Movies	English
OSN First HD	Series	English
OSN First more	Series	English
OSN First+2	Series	English
OSN First Comedy HD	Series	English
OSN Comedy+2	Series	English

Channel	Channel Type	Language
OSN YaHala HD	Entertainment	Arabic
OSN YaHala HD +2	Entertainment	Arabic
OSN YaHala Shabab HD	Entertainment	Arabic
OSN YaHala Drama HD	Entertainment	Arabic
OSN Sports 1 HD	Sports	English
OSN Sports 2 HD	Sports	English
OSN Sports 3	Sports	English
OSN Sports 4	Sports	English
OSN Sports HD Cricket	Sports	English
OSN Fight network	Sports	English
OSN News	News	English
OSN On Demand HD		On Demand
Partner Channels		
Star Movies HD	Movies	English
MGM	Movies	English
TCM (Turner Classic Movies)	Movies	English
BBC Entertainment	Series	English
BBC Lifestyle	Lifestyle	English
ITV Choice HD	Series	English
Star World HD	Series	English
E! Entertainment HD	Lifestyle	English
Style	Lifestyle	English
Food Network HD	Lifestyle	English
Fashion TV HD	Lifestyle	English
Travel Channel	Lifestyle	English
Fine Living	Lifestyle	English
MTV Music 24	Music	English
Trace Urban	Music	English
VH1	Music	English
Music Now	Music	Arabic
Disney Channel	Kids	English
Disney Channel XD	Kids	English
Disney Channel Junior	Kids	English
Cartoon Network	Kids	English
Boomerang	Kids	English
Jim Jam	Kids	English
Discovery World	Documentary	English
Discovery Channel HD	Documentary	English
Discovery Science	Documentary	English
Discovery ID	Documentary	English
Crime & Investigation Network	Documentary	English
Travel Channel	Documentary	English
Animal Planet	Documentary	English
National Geographic Channel HD	Documentary	English
National Geographic Wild HD	Documentary	English
National Geographic Adventure HD	Documentary	English
History Channel	Documentary	English
Outdoor Channel HD	Documentary	English
CNN	Business and Financial	English
Fox News Channel	News	English
Bloomberg Television	Business and Financial	English
CNBC	Business and Financial	English
France 24	News	English
BBC World	News	English
Sky News HD	Business and Financial	English
Sky News Arabia	News	Arabic
Sky News Arabia HD	News	Arabic
Al Arabiya HD	News	Arabic
Fuel Sports Channel	Sports	English

Channel	Channel Type	Language
MBC Drama HD	Series	Arabic
MBC+ Drama HD	Series	Arabic
Series channel	Series	Arabic
Series+4 channel	Series	Arabic
ART Hikayat	Series	Arabic
ART Kikayat 2	Series	Arabic
ART Cinema	Movies	Arabic
ART Aflam 1	Movies	Arabic
ART Aflam 2	Movies	Arabic
Cinema 1	Movies	Arabic
Cinema 2	Movies	Arabic
Fann	Entertainment	Arabic
Al Yawm	Entertainment	Arabic
Al Safwa	Entertainment	Arabic
Aksyon TV	News	Filipino
ANC	News	Filipino
ABP News India	News	Indian
NDTV 24/7	News	English
Times Now	News	English
Asianet News	News	English
TFC	Entertainment	Filipino
BRO (brother)	Sports	Filipino
Cinema One Global	Movies	Filipino
Kapatid TV5	Entertainment	Filipino
Sundance Channel	Movies	English
Star Gold	Movies	English
Zee Cinema	Movies	Indian
Star Plus Middle East	Entertainment	English
Zee TV	Entertainment	Indian
Life OK	Entertainment	Indian
Ten Cricket International	Sports	Indian
Baby TV	Kids	English
Aaj Tak	News	Indian
MTV India	Music	Indian
Sony Max Middle East	Movies	Indian
UTV Movies	Movies	Indian
Colors	Entertainment	Indian
Hum TV Middle East	Entertainment	Indian
Sab TV	Entertainment	Indian
ARY Digital UAE	Entertainment	Indian
GEO TV	Entertainment	Indian
Jaya TV	Entertainment	Indian
Sun TV	Entertainment	Indian
Star Vijay International	Entertainment	Indian
Asianet	Entertainment	Indian
Surya TV	Entertainment	Indian
Udaya TV	Entertainment	Indian
Gemini TV	Entertainment	Indian
Star Jalsha	Entertainment	Indian
UTV Stars	Music	Indian
Kairali TV	Entertainment	Indian
Bindass	Music	Indian
MBC HD	Series	Arabic
MBC 2 HD	Movies	English
MBC Action HD	Movies	English
MBC 4 HD	Series	English
MBC Max HD	Movies	English

Source: OSN – Orbit Showtime Network

Section VI: Abu Dhabi Sports

Abu Dhabi Sports (AD Sports/ Abu Dhabi Al Riyadiya) group of channels are owned by Abu Dhabi Media, headquartered in Abu Dhabi, UAE. AD Sports 1 (free-to-air) channel was established in 1996, while AD Sports 2 (free-to-air) was launched in 2008. In April 2010, ADMC announced the launch of its new 5 HD sports channels. AD Sports subscription is paid annually for its whole package, which consists of 6 HD sports channels, along with three HD National Geographic channels (National Geographic HD and Nat Geo Wild HD), Sky News HD, Sky News Arabia HD, Sky News HD, Al Arabiya HD, Star World HD, Star Movies HD, MBC HD channels and BBZ channel which only airs when a certain sports event is taking place. It is noteworthy that ADMC offers another four free-to-air channels; namely: Abu Dhabi Al Oula, Abu Dhabi Al Emarat, Abu Dhabi Drama, and National Geographic Abu Dhabi.

Abu Dhabi Sports channels

By February 2014, Abu Dhabi Sports encompassed 21 channels with various types but with focus on sports channels. Channel types offered by Abu Dhabi Sports include movies, series, Documentary, and news. **Exhibit 8** below details Abu Dhabi Sports channels.

Exhibit 8: Abu Dhabi Sports channels list (By February 2014)

Channels	Type	Language
AD Sports 3 HD	Sports	Arabic
AD Sports 4 HD	Sports	Arabic
AD Sports 5 HD	Sports	Arabic
AD Sports 6 HD	Sports	Arabic
AD Sports 7 HD	Sports	Arabic
AD Sports 8 HD	Sports	English
BBZ HD*	Sports	English
NAT GEO HD	Documentary	English
NAT GEO Wild HD	Documentary	English
NAT GEO Adventure HD	Documentary	English
Star Movies HD	Movies	English
Star World HD	Series	English
MBC HD	Series	Arabic
MBC Drama HD	Series	Arabic
MBC 2 HD	Movies	English
MBC Action HD	Movies	English
MBC 4 HD	Series	English
MBC Max HD	Movies	English
Al Arabiya HD	News	Arabic
Sky News Arabia HD	News	Arabic
Sky News HD	News	English

*BBZ HD only airs at certain times when a certain sports event is taking place.

Source: ADTV Network

Section VII: Al Majd

Al Majd is a Saudi Pay TV satellite network in the Arab world targeting Arab families with Islamic content. Their programs are produced in the transmission and production studios in Dubai, Riyadh, Cairo and Amman, as well as having offices in Rabat, Baghdad Damascus and Beirut.

Al Majd Channels include 12 channels in total, where 4 of these channels are open to viewers while the rest are encoded. Al Majd Channels are only available on Al Majd Receiver Systems and operate using Al Majd smart cards available at Al Majd centers.

Al Majd channels

By February 2014, Al Majd encompassed 8 channels with various types but with focus on Islamic and religious content. **Exhibit 9** below details Al Majd channels.

Exhibit 9: Al Majd channel list (By February 2014)

Channel	Language	Type
News Service	Arabic	News
Almajd Documentary	Arabic	Documentary
Almajd Nature	Arabic	Documentary
Almajd Kids	Arabic	Kids
Rawda	Arabic	Kids
Taghreed	Arabic	Kids
Radio Dal	Arabic	Kids
Massa	Arabic	Series

Source: Al Majd TV

Section VIII: beIN Sports

beIN Sports is part of Al Jazeera Network, which is headquartered in Doha, Qatar. beIN Sports (Formerly known as Al Jazeera Sports) launched its two sports FTA channels in 2003 covering local and regional sports tournaments and discussion shows. Later, in 2005, Al Jazeera launched two Pay TV sports channels broadcasting in Arabic (Al Jazeera Sports +1 and Al Jazeera Sports +2). In 2008, Al Jazeera added another two Pay TV channels to its sports package (Al Jazeera Sports +3 and Al Jazeera Sport +4). In August, 2009, Al Jazeera Sports included four more Pay TV channels to its collection (Al Jazeera Sports +5 to +8).

In November 2010, Al Jazeera Sports announced the purchase of all sportstv content, rights of broadcast and trademarks of the Arab Radio and Television (ART). The deal added a range of exclusive sport rights to Aljazeera Sport portfolio in the MENA region, including the FIFA World Cup (2010 and 2014), and the African Cup of Nations (2010 to 2016) from ART. beIN Sports already holds the exclusive rights to air major football leagues in the region; such as the Italian Serie A, Spain's La Liga, and the UEFA Champions League. Following the agreement, ART Sport channels 1 to 6 stopped broadcasting by end of 2009. In 2014, beIN Sports reached 19 Pay TV channels broadcasting major sports events, leagues and championships.

Startng 2014, Al Jazeera Sports rebranded to **beIN Sports**. According to Al Jazeera Network the move seeks to unite its global sport channels under one name ahead of the 2014 World Cup in Brazil. beIN Sports broadcasts in the Middle East and North Africa (MENA), France, the United States, Indonesia, Hong Kong and the Philippines.

beIN Sports channels

As shown in **Exhibit 10** below, beIN Sports includes 19 channels, provided in four languages; Arabic, English, French and Spanish.

Exhibit 10: beIN Sports channel list (By February 2014)

Channel	Language
beIN Sports HD1	Arabic
beIN Sports HD2	Arabic
beIN Sports HD3	Arabic
beIN Sports HD4	Arabic
beIN Sports HD5	Arabic
beIN Sports HD6	Arabic
beIN Sports HD7	Arabic
beIN Sports HD8	Arabic
beIN Sports HD9	Arabic
beIN Sports HD10	Arabic
beIN Sports HD11	English
beIN Sports HD12	English
beIN Sports	Arabic
beIN Sports News	Arabic
beIN Sports HD13	French
beIN Sports HD14	French
beIN Sports 15 HD ES	Spanish

Channel	Language
NBA TV	English
Fox Sports	English

Source: Al Jazeera Network

Section IX: MyHD

MyHD channels

MyHD launched in May of 2013, headquartered at Dubai Media city. As shown in **Exhibit 11** below, by February 2014 MyHD provided 34 channels, in four languages with 19 HD channels.

Exhibit 11: MyHD channel list (By February 2014)

Channel	Channel Type	Language
MBC HD	Entertainment	Arabic
MBC Variety HD	Entertainment	English
MBC 3 HD	Kids	Arabic
MBC 2 HD	Movies	English
MBC 4 HD	Series	English
MBC Max HD	Movies	English
MBC Action HD	Movies	English
Al-Arabiya HD	News	Arabic
MBC Drama HD	Series	Arabic
Baby TV HD	Kids	English
Fox HD	Entertainment	English
Fox Movies HD	Movies	English
Discovery Science HD	Documentary	English
Animal Planet	Documentary	English
Animaux	Documentary	English
LuxeTV	Specialized	English
Physique TV HD	Specialized	English
Duck TV HD	Kids	English
Ultra Film	Movies	Spanish
Ultra Fiesta	Entertainment	Spanish
Ultra Hits	Music	Spanish
Ultra Kids	Kids	Spanish
Untamed Sports	Sports	English
DocuBox HD	Documentary	English
Fight Box HD	Sports	English
UltraDocs HD	Documentary	English
iKonon TV HD	Specialized	English
Ginx TV	Specialized	English
CMusic	Music	English
Channel News Asia	News	English
CCTN	Religion	Filipino
GMA News TV	News	Filipino
GMA Life TV	Entertainment	Filipino
GMA TV	Entertainment	Filipino

Source: MyHD

The Pay TV industry in the region is hindered by a number of factors. Piracy continues to strike as an issue that hurdles further adoption of Pay TV in the Arab World. Pay TV piracy is rampant in the region; according to OSN, it costs the Arab pay TV industry an estimated US\$ 500 million a year in lost revenues. Therefore, service providers are forced to double their effort in order to stem piracy. Operators are taking action to overcome piracy. One of the largest attempts taken by OSN was the "swap project" in 2010, when OSN had announced on December 19, 2010 that Dreambox and other pirate satellite users would no longer be able to watch OSN channels. All old set boxes in MENA region were replaced with 'silicone-secure' boxes which are, reportedly, impossible to crack. The new encryption system includes tying the encryption code with the actual machine for which it works.

In addition to piracy, most of the Arab World remains tuned to free-to-air satellite TV channels. The barriers that possibly limit a wider adoption of Pay TV are language and economics. From the language side, most of OSN's channels are in English. Economically, many viewers seem to favor the free content of FTA channels rather than paying for TV content.

Some FTA channels' content is quite similar to content on Pay TV networks. For example, the MBC Group, with the launch of the all-movie channel MBC 2 (2002), the Arabic news station Al-Arabiya (March 2003), the children's station MBC 3, MBC 4 (women's programming), MBC Action (mainly Western programming), MBC MAX (All-Movie channel) and MBC Persia (Persian language channel), MBC MASR (The channel provides viewers a diverse selection of programming), MBC Bollywood (Indian movies and series channel) and MBC Drama (Turkish drama), has transformed itself from only Arabic MBC 1 into a budding network. Moreover, according to Arab Advisors surveys, MBC has attained a leading position in many countries in the Middle East, in addition to becoming a free alternative for Pay TV Western entertainment channels. Other FTA film channels such as Rotana Cinema overlap with Pay TV's channels such as OSN's 'Al-Aflam' and 'Cinema 1&2' channels.

None the less, the Arab Advisors Group expects an uptake in the subscribers of Pay TV in the Arab World in the coming years (2014-2017). The future looks promising for Pay TV in the region with the introduction of HD channels, Video on Demand (VoD) and 3D TV. The state of the art features are marking an evolution in the experience of viewing TV, delivering better, new, specialized content and services alongside the enhanced quality. Moreover, Pay TV has grown more appealing due to the role telecom operators have taken in the industry; through bundling Pay TV with services such as fixed and broadband lines hence, making Pay TV more appealing to the vast population in the region. The Arab Advisors Group believes that the Pay TV market will continue its growth at a steady pace with the introduction of new players in the market in the coming years.



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