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The Rising Business of Video Streaming in Mena



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ABSTRACT

This study examines how the video streaming business is developing in the Arab region. It delineates the video streaming ecosystem and discusses the opportunities for video streamers, local and global, to operate and grow in the Arabian market. Similarly, the study discusses video streamers' challenges in a complex and changing media environment. Using computer-aided analysis software (QSR NVIVO 12), the research analyzes semi-structured interviews with streaming services' top executives operating in MENA. It found that video streamers capitalize on the sizeable Arab market to grow, the way broadcasters developed the pan-Arab market in the 1990s. Localizing content, developing talent, investing in marketing and analytics, building partnerships, and diversifying memberships and payment models are essential factors in growing the streaming business. Similarly, infrastructure limitations, political context, and underdeveloped markets in the region hinder the sustainability of the streaming business.

KEYWORDS: Video streaming; OTT streaming; Streaming business; Middle East; Video streaming in the Arab region.



INTRODUCTION

In the Middle East, the entertainment business has been predominantly about broadcasting (Allagui, 2019). The household television penetration rate has been more than 90% since the adoption of satellite channels in the late 1990s (Dennis et al., 2019), but with the increasing adoption of the Internet, smartphone, and other digital technologies, streaming is attracting new audiences in the MENA (Middle East and North Africa) region (Khalil & Zayani, 2022).

The MENA region includes more than 20 countries in North Africa (e.g., Morocco, Algeria, Tunisia, and Egypt) and Asia (with Levantine countries that include Lebanon, Jordan, Syria, and Palestine; and the six Gulf Cooperation Council (GCC) countries: Bahrain, Kuwait, Oman, Qatar, Saudi Arabia, and the United Arab Emirates). They share socio-cultural features, including a common language, culture, and religion. Despite the countries' various dialects, Arabic cultural production has circulated widely across the region on free-to-air satellite channels, stimulating the business of regional media organizations. Historically, Egyptian dramas and, more recently, Lebanese and Syrian TV series and entertainment shows have had the lion's share of the pan-Arab media market (Mellor et al., 2011). Since adopting digital media, audiences have become fragmented and begun migrating to digital platforms, leading to transformations in their entertainment habits, including the adoption of video streaming viewing (Allagui, 2019).

The entertainment media streaming business involves broadcasters, telecom operators, entertainment companies, content creators, regulators, and audiences. The combination of increased internet penetration, ownership of smart devices, and new mechanisms of internationalization (Lotz & Sanson, 2021) has enabled new forms of entertainment, including video-on-demand (VOD) streaming. The video streaming industry relies on partnerships with telecommunication operators who make online distribution advantageous through bundles and special promotions, benefiting both the video streamer and the telecom operator (Noam, 2019). Video streaming services either produce their content or secure content from the more prominent media and entertainment industry companies (Kung, 2017). When this happens, they become content aggregators, collecting video content from creators and distributing access to viewers (Noam, 2019). However, some aggregators also become producers, such as in the case of Netflix.

This study examines the 'Over The Top' (OTT) entertainment business practices in the Middle East. OTT is video content distributed through Internet protocol via service providers and over public networks. OTT services are delivered through Internet broadband and mobile connections. OTT entertainment offers the advantage of flexibility, including viewing options at any time,

anywhere, and on any device viewing options, be it a TV monitor, smartphone, laptop, or game console (Kim et al., 2021). OTT providers like Netflix, the leading global OTT provider, have been expanding internationally, transforming the media production and consumption landscape globally (Gimpel, 2015).

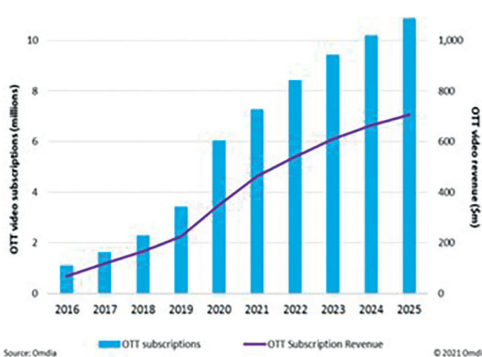
This study examines the attributes for developing a video streaming business in the Middle East while looking at the local-global dynamics of content production and distribution in the Arabian context.

VIDEO STREAMING IN MENA MARKETS

Streaming services are developing at different paces in different regions, banking on partnerships in complex ecosystems (Joshi, 2015). In addition to alliances and partnerships that enable synergy gains and win-wins (Dwyer et al., 2018; Lobato & Lotz, 2020), the countries' politics, economics, and socio-cultural factors contribute to and affect the development and success of the video streaming business. Allam & Chan-Olmsted (2021) confirm that the environment plays a key role in the streaming business in Egypt, where the dominant video streaming business model is subscription-based video-on-demand (SVOD) (Allam & Chan-Olmsted, 2021).

Free-to-air satellite television continues to be the most popular entertainment viewing platform among audiences in MENA (Dennis et al., 2019). However, since 2016 there has been a steady growth in OTT viewership, reflected in the subscription revenues highlighted below (Graph1 MENA: OTT video paid subscriptions and revenue, 2016- 2025) (Papavassilopoulos & Signorelli, 2021). In 2020, the OTT video paid subscriptions reached US\$6 million, almost double compared to 2019, partly due to the COVID-19 pandemic crisis of 2019- 20 that kept people home. The OTT subscription revenues are in a steady growth phase and are expected to reach US\$700 million by 2025 (Papavassilopoulos & Signorelli, 2021).

MENA: OTT video paid subscriptions and revenue, 2016-25



Early video streaming businesses include Starzplay Arabia and Netflix. Both lost market share in the OTT market between 2019 and 2020, from 35% to 22%, and 24% to 19%, respectively. The market share of Jawwy—an Integral Platform owned by Saudi STC—also dropped from 10% to 8% (Papavassilopoulos & Signorelli, 2021). In contrast, OSN and Amazon Prime witnessed market share growth from 2% to 8% and 5% to 6%, respectively (Papavassilopoulos & Signorelli, 2021). Shahid VIP—the streaming service of leading Saudi broadcaster MBC that started as a “free catch-up service” in 2011 (Sakr, 2023, n.d.)—reshuffled in 2020 and since then has become a significant player, witnessing a 15% market share increase between 2019 and 2022 (from 7% to 22%). Shahid VIP offers local and global content: Its growth is also mainly due to the COVID-19 pandemic and audiences’ readiness to pay for entertainment content, as discussed below.

In the wealthy GCC countries, video streaming industry is particularly prosperous because of consumers’ affordance and digital infrastructure. It witnessed an 11% growth in 2021 and is now valued at US\$1.9 billion (“GCC Video to Reach US\$2.1 Billion by 2026”). SVOD and advertising-based video-on-demand (AVOD) currently contribute 23% and 26%, respectively, to the GCC video industry and are expected to reach 31% and 34% by 2026. In 2021, the SVOD business reached US\$ 453 million in revenues, a 29% growth rate from the previous year. SVOD revenues are expected to reach US\$ 667 million, with a Compound Annual Growth Rate (CAGR) of 8%. This growth is driven by an increase in Average Revenue Per User (ARPU) as users shift from low-ARPU wholesale deals to direct-to-consumer companies and an increase in the availability of sports content online. Similarly, online advertising revenues reached US\$521 million in 2021, with a year-on-year growth rate of 54%. On the other hand, the pay-tv revenue has declined by 10%, with a current valuation of US\$631 million. Thus, it is reasonable to believe that both subscription and advertising models of video-on-demand are growing in the GCC market and shifting online.

OTT is not new to MENA; 90% of Internet subscribers already watch OTT videos, and about half are paid subscribers of at least one video streaming service (“Belgium-based media company,” 2021). Aside from subscription deals with telecoms, the monthly subscription prices to OTT services vary from US\$ 3 to US\$ 30, with local and regional streamers costing more than global video streamers. For instance, a beIN Connect subscription costs about US\$ 30 per month, Disney Plus costs US\$ 8, and Amazon Prime video US\$ 4. Starzplay Arabia and OSN+ cost about US\$ 10 per month, while Viu or Apple TV cost about US\$ 5 (based on monthly subscription prices in the UAE) (“Popular video streaming services,” n.d.).

Streaming thrives on the spread of broadband and mobile networks, bandwidths, and speeds. Thus, internet affordability and, consequently, subscriptions to streaming services vary significantly across the MENA countries: while wealthy Gulf states moved to 5G in 2019, most Arab countries still operate 2G and 3G technologies, and many areas lack basic coverage (Tomás, 2022). One must be mindful of these variations in technological readiness and capability to understand how regional streaming companies develop core capabilities and gain traction in this sector.

LITERATURE REVIEW

The entertainment industry has witnessed growth in screen time, particularly for video (Bentley et al., 2019). Streaming services provide “a large menu of audio-visual content available immediately on demand over a data network” (Fagerjord & Kueng, 2019, p. 2). OTT services have significantly changed global media consumption patterns (Gimpel, 2015). In audience studies, scholars explore audiences’ motivations for using OTT services and their willingness to pay for them (Lim & Lee, 2013; Cha, 2013; Kim et al., 2017). For instance, Fagerjord & Kueng (2019) found that streaming services present two main advantages to users: they are easy to use and enable binge-watching. On the other hand, from a production and distribution perspective, authors studied the impact of the operators’ origin on the streaming business (Kim, 2015; Lee, 2012 as cited in Kim et al., 2017), the effect of the video streaming business on the entertainment industry (Kim et al., 2016), and the new trends that emerge with OTT services (Banerjee et al., 2014; Kim, 2015). This study adds to this body of literature and investigates the video streaming business models, trends, sustainability, and challenges in the Middle East media environment.

THE STREAMING BUSINESS: WHAT DRIVES SUCCESS?

Streaming includes content producers, distributors, aggregators, and internet providers. Creating efficient ecosystems through alliances and partnerships helps video streamers perform better in the industry (Noam, 2019). Studying the development of the OTT video streaming environments, Fagerjord & Kueng (2019) and Gimpel (2015) note that the most successful competitive model is when content providers partner with an internet provider to offer valuable bundles.

Studies show that differentiation between OTT players through specialized content contributes to video streamers’ success (Wada et al., 2014). Additionally, incremental innovation leads to the growth of inventive firms and those imitating them, leading to the development of the industry (Lee et al., 2017 a; Lee et al., 2017 b). For instance, the introduction into the domestic market of YouTube (with new advertising formats allowing a wide distribution of content)

and Netflix (with a novel subscription model of content) shifted the content distribution industry, creating new growth opportunities for all parties involved (Shon et al., 2021).

Sakr (2023) notes that MENA independent producers benefited from foreign streamers in terms of professional development. She points to extended traces of foreign content in Gulf countries' TV and video productions (e.g., UAE, Saudi Arabia, or Qatar) either through the workforce of Westerners hired for local work or through US partnerships with talent and expertise to nurture and mentor the local industry (Sakr, 2023). Global streamers are interested in the GCC market not only because of its wealth but also because it is home to a sizeable expatriate population—global content consumers. This market has served as a pilot for quality content and production for the global market. Additionally, pay-TV channels, mainly housed in the GCC, found an opportunity with OTTs to expand their paid services to online platforms (Khalil, 2020).

While the environment and business models are important factors, Kim et al. (2017) note that consumers' intentions to subscribe to and pay for OTT services are the most critical factors in sustaining a company's OTT business. In studying Chinese and Korean markets, the authors also found that "recommendation system, resolution, and viewing options are important attributes" to growing a streaming business (Kim et al., 2017, p. 205). Therefore, no one factor can be agreed upon as driving the success of streaming businesses. Additionally, these factors might differ depending on their geographic markets. This leads to the first research question, which concerns understanding the sustainability and success of Arab-based video streamers.

RQ1 What factors enable the growth and success of video streamers, particularly in the MENA region?

MONETIZATION MODELS AND WILLINGNESS TO PAY

Streaming services' monetization models include subscription fees, SVOD (which is the most common model), advertising (Advertising-based Video on Demand), or a hybrid model of subscription fees and advertising, SVOD and AVOD (Fagerjord & Kueng, 2019). Subscription fees enable unlimited viewing during the subscription period (typically monthly but also yearly), during which subscribers can access unlimited library content. Thus, premium unlimited streaming is offered either ad-supported, with no subscription fees, with optional ads and monthly fees, or with no ads and monthly fees. The transactional model, or transaction-based video-on-demand (TVOD), enables consumers to pay per viewing piece. This model was inspired by videotape rental decades ago and the pay-per-view commonly used in hotels and for sports games on

cable. Content bundles can be interesting both to the users and the streamers: The former see value in the offered proposition, and the latter(s) “do not have to estimate precisely the user’s perceived value of every single item, but can predict average value across consumers.” (Colbjornsen et al., 2021, p.151). As video streamers continue experimenting with a combination of possible models, monetization is not always straightforward: Kim et al. (2017, 199) note that in China, streaming monetization is based on a combination of free and premium services, yet it “remains obscure.”

Although audiences are increasingly willing to pay for video content, as witnessed during the COVID-19 pandemic, viewing freely downloadable content, sometimes pirated, remains common (Nagaraj et al., 2021). This is the case in Korea, where “illegal downloading of video content is prevalent” (Kim et al., 2017, p. 199)—those who cannot access or pay for premium content resort to consuming its pirated versions.

Nagaraj et al. (2021) studied the factors affecting the willingness to pay for video content. They found that, compared to viewers with no subscriptions, consumers with OTT service subscriptions were more concerned with access (unlimited, all-time, all-device), content (local, original, and global), and features to expand and upgrade their viewing experience constantly. Moreover, OTT users noted that the main reason for their subscription was an ad-free experience, unencumbered by the persistent interruptions endured on cable channels. Nagaraj et al. (2021) found that ongoing cable connection, a perception that little value was offered by SVOD services, and expensive OTT subscriptions on top of the cost of internet connectivity, were possible causes of resistance towards OTT subscriptions. Additional causes included a busy schedule and the adverse effects of OTT programs, such as binge-watching.

This leads to the second research question, which explores the monetization models of video streamers in MENA and the region’s peculiarities regarding paying for streaming content.

RQ2 What monetization models are streamers adopting in the MENA markets?

CONTENT MODEL: DOMESTIC VS. GLOBAL

The globalization of cultural products has often generated a vivid debate between liberalism and protectionism: the former advocates free world trade values, including the support for international flows of cultural goods, while the latter tends to limit consumption of global content and prioritize domestic cultural production and consumption for socio-cultural, political, and economic reasons. From a conservative perspective, it is believed that overseas content distribution platforms will eventually reduce the size of the domestic content

distribution industry (Arsenault & Castells, 2008; Warf, 2007) and prioritize homogenization.

The video streaming market has also generated a protectionist vs. liberal debate: Opening domestic markets to global platforms like Netflix can threaten the domestic industry either because it is not competitive regarding quality and economy or because the local culture and socio-political norms can be threatened; “Digital distribution does not come ‘over the top’ of culture; it must negotiate the rough terrain of markets characterized by fundamental differences in tastes, values, cultural norms, viewing habits, income levels, and connectivity” (Lobato, 2019, as cited in Sakr, 2023, p.2). In contrast, some argue that introducing global platforms can improve domestic products and leverage the industry by enhancing quality—through imitation or even by offering opportunities to distribute domestic products globally (Picard et al., 2016; Ganuza & Viicens, 2013). For instance, a study by Kenney and Zysman (2015) shows that global OTT platforms have positive effects, as they enable domestic content producers to reduce the barriers and costs incurred when entering overseas markets.

Global OTT platforms enable content distribution companies to implement smoother distribution, greater economies of scale, and interactive technologies (Doyle, 2010; Bennett & Strange, 2008; Roscoe, 2004). OTT platforms could expand the star system globally, and enable users to discover and consume other cultures, leading to overall growth (Cunningham & Craig, 2016; Broughton et al., 2020, as cited in Shon et al., 2021). Shon et al. (2021) studied the impact of introducing global OTTs on the domestic industry. They found that OTT platforms have made it easy for competitive domestic-content companies to enter overseas markets. These authors noted that the presence of global OTT platforms in the local market led to growth in the local content industry, and they pointed out that the impact of this growth varies depending on the platforms involved. Thus, the third research question will explore how the global networks have developed so far in the Arab markets, continuing earlier debates about media flows and protectionism against foreign content.

RQ3 What content strategies have video streamers adopted to optimize their businesses in the MENA markets?

METHODOLOGICAL APPROACH

This research adopts a qualitative approach. It analyzes the content of in-depth interviews with eleven video streaming experts operating in the Middle East. The interviews are semi-structured and conducted during the Asia Pacific Pay-TV Operators Summit (APOS), a yearly event organized by Media Partners-Asia, a research and consulting firm specializing in media and telecommunications in

the Asia-Pacific region (see Table 1: Names, roles, and affiliations of interviewees). The interviewers are media consultants and organizers of the Summit and hold the President and Vice-President positions at Media Partners-Asia.

Table 1. Names, roles, and affiliations of interviewees

Name	Role	Company
Danny Bates (P1)	Chief Operating Officer & co-founder	Starzplay (a subscription VOD streamer)
Mohammed Soliman (P2)	Senior Associate	McLarty Associates (International strategic advisory firm)
Rohit D'Silva (P3)	Chief Business Officer	Viu (pan-regional video streaming service from Viu International)
Ziad Khammar (P4)	Chief Operating Officer	DMS (Digital Media Services, a digital subsidiary owned by the Choueiri Group, an advertising media service)
Tony Saab (P5)	Vice President, Content Production	Intigral (Digital entertainment subsidiary owned by Saudi telecoms)
Nicolas Torloting (P6)	Chief Operating Officer	Front Row Filmed Entertainment (MENA independent film-distribution company)
Peter MrKic (P7)	Vice-President, Corporate Strategy & Governance	Intigral (Digital entertainment subsidiary owned by Saudi telecoms)
Olivier Bramly (P8)	Chief Executive Officer	E-vision (media and entertainment subsidiary of UAE telecom group Etisalat)
Hans Fraikin (P9)	Commissioner	Abu Dhabi Film Commission (government agency to support the Abu Dhabi film and TV industry)
Abraham Mathew Manoj (P10)	Executive Vice-President & Territory Head	Zee Network (Indian media conglomerate)
Sudhir Nagpal (P11)	Senior Vice-President & Lead International Distribution	Star & Disney India (Indian media conglomerate owned by Walt Disney Company India)

All interviews are part of the virtual series that discuss the GCC/MENA region media sector, primarily pay-TV and online video. The interviews were streamed online during the summit from September 7- 9, 2020. A recording was made available to the summit participants for six weeks post-conference. Each interview lasted at least 40 minutes. The researcher's students transcribed the interviews and uploaded the transcribed Word document files to NVIVO 12 software.

The coding was completed by a single person and started with detailed, line-by-line coding of the first four transcripts until there was no need to create new codes, as the existing codes covered the remaining transcript. Before coding the data from the subsequent interviews, these codes were scrutinized to reduce their number. All coded interviews were reviewed and read several times to ensure that the created codes accurately described the coded data and that there were no duplicates. The process of analysis happens as the researcher completes the coding. One strength of NVIVO is "its ability to allow the researchers to assign meaning to the data during the coding stage rather than after lexical analysis" (Wilk et al., 2019, online).

First, these descriptive codes were organized hierarchically into a 'parent-child' relationship (QSR international, no date), a term used in NVIVO to refer to the hierarchical organization of codes. For example, a mentoring node (code) can have two child nodes: a positive experience and a negative experience. Mentoring is the broader, first-level node identified as a parent node, and 'positive experience' and 'negative experience' are the child nodes.

After the hierarchical organization was completed, each code was read. The duplicates were eliminated by merging two or more codes into one, and these codes were used to code the subsequent interviews.

Through merging, the codes were gradually transformed from line-by-line, descriptive codes into more conceptual ones to categorize the existing coding framework further. At the same time, the processes of merging and re-naming the codes were also constantly taking place to reveal a final set of themes (codes) and sub-themes. Through these processes, the number of codes was reduced to 129 thematic frameworks: 70 relating to the business growth factors, 42 to the trends in the streaming business, and 17 to the challenges that streamers face in today's markets.

The quantitative output generated by NVIVO (e.g., the number of times a theme was discussed) does not imply that one theme is more important than another. As qualitative research, what matters in the analysis is to detect the ideas that emerge from the informants rather than how much those ideas weigh compared to each other. One limitation of this methodological approach is that the researcher is driven and limited by their epistemological position, which makes the researcher bias possible (Wilk et al., 2019).

RESEARCH FINDINGS

The study aims to understand the video streaming business in the MENA markets. In addition to providing a “helicopter view” (Wayne, 2019, online) of this business, the study aims to identify this industry’s opportunities, growth factors, and challenges. The analysis of the interview transcripts produced the following thematic framework (Table 1: Emerging themes & sub-themes from video streaming interviews).

Table 2. Emerging themes & sub-themes from video streaming interviews

Theme	Files (N participants discussed the theme)	References (N times the theme was mentioned)
Factors contributing to growth and success of the video streaming business	7	70
<i>Internal factors</i>		
<i>Content strategies</i>	6	20
Produce diverse, relevant, and relatable content	6	14
Have unique and exclusive content	2	3
Optimize recommendations by family and friends	1	3
<i>Audience strategies</i>	4	17
Consider and understand the audiences of different generations, habits, and preferences	4	8
Focus on optimizing user experience	2	7
Retain current customers and gain new ones	1	2
<i>Management Strategies</i>	3	16
Invest in Marketing decisions (invest in marketing; use analytics; differentiate your brand)	2	7
Hiring decisions (local and workforce from abroad)	3	5
Integrate payment methods across the region	1	4

<i>External factors</i>		
Possibility of partnerships and collaborations	3	10
Political landscape that facilitates growth	1	3
Covid-19 new possibilities	2	2
Common language in the region	1	1
Competition accelerates growth	1	1
Adopted models and trends in the video streaming business		
Brand positioning	4	14
Balance re: linear TV and streaming	5	9
Geographic expansion	3	6
Content aggregation from various platforms and providers	4	5
Diversification of membership models	4	4
Viewing across devices experience	2	3
Sports streaming	1	1
Challenges faced in the video streaming business		
Advertising and marketing opportunities are limited	3	9
Infrastructure specific to MENA	2	3
Competition	1	1
Long-term planning and forecast	1	1
The habit of consuming free content	1	1
Political landscape that hinders development	1	1
Underdeveloped markets in the region: limited market	1	1

THEME 1: FACTORS CONTRIBUTING TO THE GROWTH AND SUCCESS OF THE VIDEO STREAMING BUSINESS

The experts interviewed unveiled their strategies to grow their OTT businesses. Factors contributing to the growth of the video streaming business were coded 70 times across seven interviews. The success factors are internal and external: They are internal when the decision-making is taken within the organization and external when the growth factors are tied to the environment and out of the organization's control.

INTERNAL FACTORS

The most discussed business growth factor is producing diverse, relevant, and relatable content (coded 14 times across six interviews). The interviewees described how important and worthwhile it is to offer local content that resonates well with audiences; according to the Starzplay co-founder (Participant P1), it "provides extra engagement and extra satisfaction for customers." The OTT video experts noted the following factors as the main parameters for creating local content: first, invest in research to find insights, understand the local context, and know the audience, their media habits, and viewing preferences; and second, identify relevance to both consumers and advertisers who can participate in the content creation process and convey the brand message. Producing local content "pays off in the short and long term," says P2, and provides growth opportunities, as confirmed by P3 from Viu.

While several streamers became interested in distributing local content, exclusive content, whether movies or series and licensing opportunities, ensure differentiation and positioning through their unique selling points, says P5. Having differentiated attributes and selling proposition(s) enables the brand positioning of the video streamers and secures a clear and unique position in the media and entertainment content ecosystem. For instance, Etisalat's E-vision claims to "offer the best kids' content in the UAE" and unique in-house Indian movie channels, while Starzplay sees itself as "the hub and content hypermarket of the region," bringing different content providers to its customers. Intigral perceives its uniqueness in offering exclusive content through licensing localized originals.

According to the experts, optimizing recommendations by family and friends (coded three times) is another internal strategy contributing to business growth. Speaking about Etisalat's experience, Bramly notes, "In the UAE and the region, there are key trends similar to global trends: video now is watched on all devices, and the content viewed by users is increasingly pushed by recommendation whether by friends and family. Our data shows that almost 50% of viewers discover new content through recommendations by friends and family."

Developing strategies relevant to the audiences is another critical factor in growing the streaming business (coded 17 times across four interviews). First, researching the audience was coded eight times across four interviews. The video streamers highlighted that their audiences are not homogeneous, but they manifest different interests, tastes, and viewing habits; they also belong to different age groups. Thus, conducting audience research and appreciating each segment's attributes is important to offer relevant content for each group. For instance, P3 from Viu spoke about content personalization based on consumers' preferences and interests: "About 95% of our customers are Saudis; over the last 3- 4 years, we have added more Arabic content to our customers who prefer local content. We keep experimenting to understand what Arabic content works and where we can invest more money. Secondly, we have added Turkish content over time to meet the consumers' expectations. We also found that Turkish series dubbed in Arabic work very well in the region. "

Then, optimizing the user experience is coded seven times. For instance, users want "a smooth, intuitive, and seamless experience," said P8, and they want to watch their content "anytime, anywhere, and on any device; we have to offer that, " said P7.

Finally, developing strategies to retain customers and gain new ones was coded twice. P1 from Starzplay said that a well-established brand name earns organic growth. He added, "We have done much work on our CLM (Customer Lifestyle Management) strategies, retaining those customers, automating what happens when a customer churns, when they request the churn when we do not see a successful payment on a card, so all these attention activities helped improve our retention rate. "

According to the MENA streaming experts, other internal factors that contribute to the growth of the streaming business are mainly managerial (coded 16 times). Experts spoke about the importance of investing in marketing, identifying a unique positioning of their brand to differentiate one video streamer from another, and using new technology to understand the audiences and their behavioral patterns to attract both audiences and advertisers; P8 pointed to the poor audience measurement in MENA: "I must admit that MENA still is lacking behind the rest of the world in audience measurement for the TV advertising industry; we launched our new rating system TAM, and we believe that it provides excellent analysis for TV programming, acquisition, and content syndication, " he says. Another key managerial decision concerns hiring. The experts discussed the insufficient expertise available locally and the need to hire a foreign workforce. However, this should be balanced by hiring local people familiar with the local and regional context.

Finally, payment methods have facilitated business growth. Not long ago, credit cards were barely used in the region; now, with the integration of payment methods across the region, through carrier billing, applications like Apple Pay, and, more generally, credit cards have proven crucial to the sustainability of the business.

EXTERNAL FACTORS

Partnerships and collaborations with third-party providers and telecoms (coded ten times) are crucial growth factors for MENA's local and global video streamers. During the interviews, experts pointed to their efforts “to partner with telecoms in prospective markets as the preferred option to enter new markets,” says P7. They also spoke about the importance of collaborations “with third-party providers to ensure connectivity with the end-user through a payment method,” as audiences are still reluctant to pay for media content and often have no credit cards to pay online. Additionally, experts spoke about the value of partnerships in aggregating content and building their catalogs.

The political environment can be decisive in video-streaming business sustainability. For instance, investment in building and improving the infrastructure creates new opportunities. P8 explains that “with Saudi Arabia's new cultural strategy that includes spreading cinemas and other cultural venues, new growth opportunities have emerged for content producers, actors, and production companies.” Similarly, the GCC governments are driving their economies off oil, speaking to a genuine desire for diversification, says P2. The experts see this as a supportive political landscape for business growth in the Gulf states. Egypt remains the largest media hub in the region. The Egyptian government maintains media as one of its growth pillars. It sponsors the largest media company in the country, continuously engaging with and committing to the historical role of Egyptian media but also using it as a tool to control freedom of speech. When infrastructure is strategically built, it supports growth. Having studios with cutting-edge technology and facilities to support customer service, whether by location, production services, or client servicing, producers can find such infrastructure helpful, notes P9.

With the COVID-19 pandemic, the experts unanimously confirmed that their audiences turned to OTT consumption during the lockdown and cinema closure across the region, amplifying audiences' migration to digital and their adoption of OTT video streaming. P8 notes, “User experience increased greatly during the COVID-19 lockdown. We also witnessed organic growth – what was set to happen over a couple of years, all happened in a year. VOD consumption has increased substantially – by 40% in the MENA region.”

OTT streamers agree that distributing content across a large market such as the Middle East optimizes monetization. While so far, subscription to English content is common; the opportunity lies in offering content for the local audience. “It is the right time to write the local content for the local audience,” says P6. Producing originals with a pan-Arab cast helps productions to work in multiple markets and reach more than 350 million Arabs. With the Arabic language common across MENA facilitating access to a populous region, “it is easy to monetize,” notes P4.

According to the streaming experts, competition is the final external factor that can generate growth in the video streaming business; it “pushes global streamers to success,” according to P9. While the Arab region has not reached a high level of competition, a scenario similar to the one in “Canada, [...] brought up by competition between Montreal, Toronto, and Vancouver” would be healthy for the region, notes P9.

THEME 2: ADOPTED MODELS AND TRENDS IN THE VIDEO STREAMING BUSINESS

The adopted models and trends theme was coded 42 times across eight interviews.

The video streamers spoke about brand differentiation and positioning as a trend in the business (coded 14 times) to a great extent. They said it became crucial to find unique attributes specific to their brands and to differentiate themselves from competing brands. They cited this not only as a growth factor but also as an adopted practice they cited as ongoing and important to embrace.

The second most discussed trend is balancing linear and streamed TV (coded nine times across five interviews). Free-to-air TV remains a large market in MENA and a prime location for providing advertisers with high reach, mainly thanks to Saudi Arabia and Egypt’s populous markets. P8 says the MENA market is quite similar to many other competitive markets facing new challenges with the rise of OTT and changing media habits. However, it is unique regarding sustainable and still-growing linear-TV consumption; “the consumption of e-life has not been impacted by the rise of OTT,” he notes. Similarly, P6 said that people still want a relaxed viewing mode. On their linear channel, audiences will see whatever is running. However, the shift is happening: Users are adopting streaming, though the library in streaming is still not as massive as Netflix’s, he adds. Thus, linear still complements OTT and streaming in MENA. This is the case for pay-TV like Shahid or Starz, which offer both OTT and streaming on their platforms.

Interest in content aggregation is another trend: aggregating content was coded five times across four interviews. P7 describes Intigral’s business as an

aggregator and a major content supplier intending to become the main movie hub in the region. Similarly, StarzPlay aims to become the content hypermarket of the region, offering deals from multiple content providers to its consumers: “We want to be a multichannel video programming distributor (MVPD¹) where we basically bring everybody on board, and we are able to offer that to our consumers”, says P1. DiscoveryPlus is the first StarzPlay aggregator partner to which Paramount Plus, HBO, and Peacock were added. They offer on-demand and live TV streaming services for channel-specific streaming.

The geographic stretch is another trend discussed by the streamers, as they want to take advantage of the spread-out MENA region and visit different countries within it. Some hubs remain important, and Abu Dhabi aims to become the media and entertainment production hub. According to P6, Abu Dhabi started owning this positioning with the economic and industrial development of the media and entertainment sector witnessed in the city. As for P1, he notes that the need to scale is necessary. He mentions plans to continue investing in the business and expanding aggressively in the MENA market while capitalizing on the organic search for platforms and content consumption growth.

With the diversification of membership models (coded four times across four interviews), streamers increasingly offer paid memberships to consumers. TV (and, along with it, free-to-air advertising FTA) still has a high reach, but AVOD is growing, and consumers are becoming more receptive to AVOD. AVOD is believed to positively impact the brand, according to P4. So far, the main way entertainment content is monetized is through advertising, yet “advertising is shifting from traditional to digital, “ notes P3.

While Arab audiences are still migrating to video streaming, they have become interested in viewing across devices. Speaking about the Jawwy TV experience (Intigral), P7 says,

“We’re trying to move away from having devices in the home. When we initially launched Jawwy TV, there were two different versions: the Jawwy TV app version, which was targeted at smartphone and mobile customers, and the Jawwy TV home, which is more of a fixed offering for residential customers. But what we found out is that customers are very mobile, and they are viewing their content irrespective of the device. So, we decided to do away with the devices altogether. And we have recently launched a suite of applications that

¹ MVPD is a streaming service that provides multiple linear video content to the consumers that delivers high-quality broadcasting.

are available across not only your mobile device but also your smart TV. So, for example, we've got an Android TV version that's been recently launched. We have a Samsung TV, GTV, and we've recently made it available on Apple TV. So, customers can view their content anywhere, anytime, without having to view it through a device. "

Finally, in addition to entertainment content, another trend area is found in sports, P1 says. P8 notes that the future is moving beyond video and toward "Content with a big C"—all kinds of quality beyond video, including gaming, e-sports, and e-learning.

THEME 3: CHALLENGES FACED IN THE MENA VIDEO STREAMING BUSINESS

Video streamers face numerous challenges in the Middle East (coded 17 times across five files). First, they spoke about limited advertising and marketing opportunities (coded seven times across five interviews). For instance, P4 wonders if there is enough money for all media players, "especially since MENA is one of the world's lowest advertising-per-capita markets, and it has never been sufficient to please everyone. " Launching marketing campaigns and engaging in raising awareness can be challenging for new entrants, thus the advantage of partnering with local telecom operators. Also, the participants noted that measuring and evaluating engagement can be challenging, as the metrics may not reflect the active time of viewership owing to unattended viewership and archaic survey methods to capture audiences.

MENA's infrastructure proved to be a challenge. Video streamers spoke about the region lacking both hard and soft infrastructure. The hard structure includes purpose-built studios with soundstages with their own production offices and warehouse. These are important "especially in the summer months; you don't want those who just had their makeup done to walk in 40-degree heat, their makeup running by the time they get to set; so everything needs to be contained, and we built about a dozen units of those in Abu Dhabi, " says P9. The soft infrastructure includes client service, production services, and assistance with finding production amenities such as affordable hotels, etc. In addition to the UAE, P2 spoke about how Egypt and Morocco are also heavily engaged in improving their infrastructures compared to the rest of the countries.

While streamers have invested in digital and diversified content, the market is contracting, and there is not enough money for all players. Several countries in the region suffer from challenging political environments that push away businesses. Similarly, app payment is unavailable in some countries, and connecting with the end-user through a payment remains challenging. Because of the complex MENA environment, especially after the uprisings, long-term

planning has been challenging, if not deficient. Since the COVID-19 pandemic, the use of credit cards to pay for entertainment content has increased. However, some users still do not see the need to pay for media content.

DISCUSSION

This study aimed to examine the video streaming business as it develops in the MENA region and raise awareness among academics and practitioners of the emerging opportunities, practices, and trends in the region as they unfold.

The high Internet connectivity in the region, combined with the improved infrastructure (i.e., high speed) and high smartphone ownership, particularly in the wealthy GCC region, make video streaming a natural entertainment option for connected audiences (Khalil, 2016). At the same time as the adoption of video streaming soared during the COVID-19 lockdown, people, hitherto “immersed in long-standing sociocultural practices (e.g., expectations for free access to services and preference for cash transactions)” (Khalil and Zayani, 2022, 1534) became more comfortable paying for digital content online and using credit cards thanks to the momentum conjuncture of the coronavirus (Allagui, 2020). This shift in audiences’ behavior, combined with the advancement in digital technologies and improved infrastructure, has set the ground for a growing video streaming business in MENA.

While there is no unique golden rule or recipe, the factors discussed by the experts/interviewees provide material to understand the peculiarities of the Arab market and a down-to-earth perspective of operating a VOD business in MENA. The study’s results, which indicate how video streamers have transformed the entertainment industry in MENA, are of crucial implications to regional and global media managers interested in the Middle East.

ARAB AUDIENCES AND THE SIZABLE, UNEVEN MENA STREAMING MARKET

The advent of streaming is reconfiguring audience viewership patterns in the region. The Arab audience is primarily a broadcast audience, but streaming has become an attractive option as they turn to digital platforms (Allagui, 2019). Video streamers compete for the viewers’ airtime: they must innovate while simplifying and enhancing their customers’ experiences, such as offering auxiliary services on the platform. Wang et al. (2019) argue that only a few studies explored streaming audiences’ motivations, and most of these studies found either adoption of online behavior or addiction as motivation to watch streaming content. The authors add that understanding the audiences’ behavior and preferences is crucial to understanding the market status. This study’s results show that conducting audience research and investing in understanding the streamers’ audience data enables businesses to retain

customers, attract new ones, offer relevant content, improve product offerings, and optimize customer lifetime management, all of which lead to growing businesses. However, the region continues to struggle to provide reliable audience data to media professionals and advertisers: Audience measurement has been a consistent and recurrent problem in MENA (Allagui, 2019; Sakr, 2020; Khalil, 2016) that extends to the video streaming age. Etisalat's E-vision said they turned this limitation into an opportunity and launched their own rating system, TAM. As the streaming experts noted, technology is both enabling and challenging in MENA. While it might be possible for big players like Etisalat to innovate and create innovative solutions, this is hardly the case for smaller organizations in less advanced countries of the Middle Eastern, as the gap has been only deepening between most and least advanced countries of MENA (Chroufa & Chtourou, 2023).

Equipped with the best infrastructure for OTT content production and home to the major video streamers, the Arabian Gulf (i.e., GCC countries) is the natural streaming hub in the region and the most profitable for video streaming businesses (Khalil, 2020). Despite a persistent digital divide among Arab countries and a lack of affordability, the study shows that expanding to populous MENA countries other than the GCC represents a growth opportunity for video streamers: The experts spoke about partnerships and collaboration opportunities between streamers and local telecoms, licensing deals, and sale agreements to be made among video streamers that are currently located in the prime and highly concentrated business space of the UAE, KSA, Bahrain, and Kuwait (Khalil, 2020).

In the past, the GCC countries' geographic concentration helped develop the pan-Arab broadcasting and advertising business (Allagui, 2019). Today, it is remarkable that the streaming business is developing along the same pattern: The major streamers operate from the Gulf (Dubai particularly) and have access to the same advanced infrastructure, including major media actors and tech talent, media technologies, and production firms. Supported by open cultural policies (Ayish, 2021), telecommunications and studios' infrastructure, content creators, production teams, talent, brands, and advertisers continue to be concentrated in the GCC countries.

The expansion perspective that involves penetrating other countries is merely about reaching mass audiences in those markets and creating bundles with telecom operators and their partners who (most often) turn out to be GCC operators, like UAE's Etisalat or Qatar's Ooredoo.

However, as the streamers' libraries develop and new content is envisioned, it is important that global or regional streamers look beyond the GCC hubs, Dubai, Abu Dhabi, or Jeddah/Riyadh, for expansion opportunities. Khalil

(2020) notes that the streamers went north and west early on when they were building their libraries and taking advantage of a time when no regulation and almost no competition existed, but now developing their libraries requires considering a broader geographic scope. For Sakr (2023, n.a.), the introduction of and access to foreign streamers offers new alternatives to local producers short of local funds and public support. She writes, “Independent producers, denied outlets by governments and their allies, have turned instead to Netflix for commissions and overseas entities for professional development.” Sakr (2023, p.10). This is less true for the wealthy GCC countries, where the Arab OTT market is concentrated: GCC governments have been supporting local cultural production and distribution as a new source of the creative economy. If companies turned to foreign streamers, it was not because of a funding shortage but mainly to enhance skills and professional development.

LOCALIZING CONTENT AND STRATEGIES

Localizing content- shooting in local places and including local stars- can expand to new markets in the region. Audiences can relate to local originals close to their interests and cultures. In fact, in the Arab region, this is déjà vu since Arab countries consume mainly local content (although typically of lower quality and less bold than Netflix productions, for instance).

Global streamers like Netflix that consider localization strategies aim to include a pan-Arab cast, celebrities of different Arab nationalities who are admired across the region, topics relatable across Arab countries, and in a language accessible to the potential audience of 350 million Arabs. A recent example is Netflix’s original, *Ass’hab wela Azaz*, a remake of *Perfect Strangers*, produced by New York-based Empire Entertainment and shot in Lebanon. The comedy-drama targets a pan-Arab audience through a cast of celebrities across the region, including Lebanese, Jordanian, and Egyptian actors. Another notable example of video streaming productions targeting Arabs across the region through a mixed-nationality cast is *Aroos Beirut*, produced by Saudi broadcaster MBC—a video streamer through its platform *shahid.net*. The series is launched exclusively on the paid platform first, then is made available (or recycled) for free on the satellite channel. Although the cast is almost exclusively Lebanese, the star protagonist is the Tunisian-Egyptian actor Dhafer Al-Abidine, who has millions of fans across the region (e.g., more than four million followers on Instagram). *Aroos Beirut* is an adaptation of the popular Turkish television series *İstanbulu Gelin* (*The Bride of Istanbul*). As Turkish drama is still prevalent in the region, another strategic extension is dubbing content that the streaming experts in the study concur to find attractive to Arab audiences (Berg, 2023), despite their exposure to local and international content.

While producing content attractive to local audiences is natural and inevitable, one cannot overlook that the video streamers' strategies mirror the ongoing practices of pan-Arab broadcasters, which revolve around featuring Arabs of various nationalities speaking familiar Arabic and collecting fans across the region. Video streamers are using a geographic expansion strategy, capitalizing on the Arab talent across the region in entertainment shows like MBC's *The Voice*, with famous pan-Arab singers; religious and historical movies; and teleseries specially made for the Ramadan season.

As the streaming experts acknowledged, audiences in Arab countries still rely primarily on free-to-air, linear television first, even if this means exposure to advertising. The predominance of satellite television in the region, accessible to almost every household, is not disappearing any time soon, especially as most audiences still suffer from the aftermath of political, social, and economic crises. The wealthy Arabian Gulf market, with its highest expatriate population, is an exception: It is home to global OTTs and the highest concentration of VOD audiences, particularly among the young and very tech-savvy who spend more time on screens and are willing to pay for subscriptions to avoid advertisement distraction. AVOD remains a major monetization method for streamers in the region, as audiences still do not mind advertisements. However, some have noticed that SVOD is also growing, thanks to the lockdown under the COVID-19 pandemic and an increasing willingness to pay for content, especially as credit card usage grows within the region. Partnerships remain crucial to diversify payment methods as audiences begin considering payment for content. MBC's *Shahid*, for instance, enacted a partnership agreement with carrier billing Ooredoo to integrate the *Shahid* subscription fees into Ooredoo mobile data-usage billing.

It is fair to say that today's streamers replicate the strategies used for years by broadcasters, advertisers, filmmakers, and producers. They capitalize on pan-Arabism to grow, but a pan-Arabism that speaks to identity and culture. Discussing various movies produced in the 1990s in Tunisia, Lebanon, Egypt, and Syria, Khoury (2005, 10) notes: "All these films tackle the dilemmas of searching for national identity through foregrounding marginalized social elements and lives in the streets and alleyways of major Arab metropolises. Instead of claiming national 'universalities,' these films depict social and cultural settings, characters, and materiality, which offer complex renderings of a rapidly changing society struggling to reclaim its national identity." As the global circulation of Arabic productions flourishes across the region and beyond (including the diaspora's productions in the West and the participation of Arabic productions and co-productions in global film festivals), cultural diversity fostering Arab identity(ies) is increasingly integrated into

the globalization of flows. The streaming platforms present opportunities for local and regional content to be showcased among streamers' libraries in MENA and globally.

THE REGULATION OF THE STREAMING MARKET

While regulation of the video streaming business is still in its early stages, MENA countries must clarify their local content regulations and protection strategies. While some markets provide quotas for international content to protect the local industry (or do not allow foreign media services like China, or more recently Russia, to operate in their countries), little is done in the region to raise questions about local vs. international content. The UAE has set a limit for foreign content in streamers' libraries, but none of the other countries has clear quotas, especially as consumers access the services through VPN.

One should also remember the high piracy level, whether by illegally sharing customer accounts with relatives or manipulating OTT television subscriptions—even though none of the participants mentioned piracy as a serious problem in MENA. The streamers themselves took advantage of low regulation early on when they built their libraries through acquisition. Khalil notes, “The promises of lucrative revenues from OTT services have attracted several regional entrepreneurs who benefited from a first mover strategy to establish services without a legal structure and foreign competition. Working from Beirut, Dubai, Cairo, or Saudi Arabia, these entrepreneurs amassed a large portfolio of old movies and series and started investing in exclusive content” (Khalil, 2020, p. 458).

Lastly, conducting almost any kind of business in the region is conditional on a stable and positive political environment, and the streaming business is no exception. Participants spoke about political environments that could represent both challenges and opportunities. Governments that develop a cultural vision support creativity and facilitate cultural production because they see culture as an economic diversification enabling a competitive edge. *Certes*, Egypt, and Saudi Arabia have very large populations, which enable economies of scale, but also their governments have made entertainment one of the economic pillars for diversifying the economy (Allam & Chan-Olmsted, 2021; Saudi Vision 2030, n.d.). Video streamer Intigral prides itself on supporting Saudi Arabia's political vision when diversifying its portfolio, connecting and bonding with the local audience while taking advantage of the cultural opportunities offered and supported by the government.

While in some countries, the introduction of global OTT streamers and the lack of regulation toward them may threaten national broadcasters (as in Canada or Europe, with the establishment of quotas for video streamers), in MENA, there is little or no protection for national broadcasters yet, for reasons that include

the pre-eminence of the free-satellite system, which creates little regulatory tension between broadcasters and OTTs. If there is any cultural tension, it is often driven by audiences, not regulators; such is the case of Netflix's Arabic remake of *Perfect Strangers*, *Ass'hab wela A3az*, which provoked reactions from Arab audiences rather than from the authorities (Allagui, 2022). The regulators continue to scan content and ban any that is anti-political or against the countries' religion or cultures.

CONCLUSION AND LIMITATIONS

This research fills scholarly gaps in the Global South's media management field and contributes to the literature on the video streaming industry in MENA. It aims to provide an overview of the streaming ecosystem in MENA and unveil successful business practices. While literature has developed in the West and Asia about OTT global platforms such as Netflix (Frade et al., 2021), almost no scholarship has emerged from the Arab region (Allam & Chan-Olmsted, 2021).

The current study reveals that multiple factors contribute to the growth of the VOD business in MENA. They include audience analysis, customer management systems, hiring local and regional talent, building libraries, developing know-how through partnerships and collaborations, and geographic expansion across the region. The challenges include an underdeveloped infrastructure, an unstable political environment, and a need for more technical and marketing competencies (e.g., big data analysis, audience measurement tools, etc.).

This study analyzes semi-structured interviews with video streaming experts who hold top executive positions in their respective global and regional businesses. The participants self-reported their positions and spoke about their experiences in a public forum that included their competitors; their responses are subjective and might not reflect the reality in its totality but selectively consider the forum environment. In addition to their self-reporting, the similarity between these high-profile speakers at this APOS event may represent another study limitation: the majority are males, CEOs, and COOs; all are based in the Gulf (eight based in the UAE and two in Saudi Arabia)—although this does reflect the reality of the business as discussed above. Although they are competitors, the streamers' perspectives were quite similar, despite their attempts to sound unique and differentiated. This made it convenient to identify themes and sub-themes, but additional perspectives from local agents or partners based in non-GCC countries could have pointed to alternative issues. Alternatively, understanding what live streamers provide to their audiences from an analysis of their programming and media can help appreciate the gap between supply and demand and the regional gap discussed above. Further research in these directions will complement this study.

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