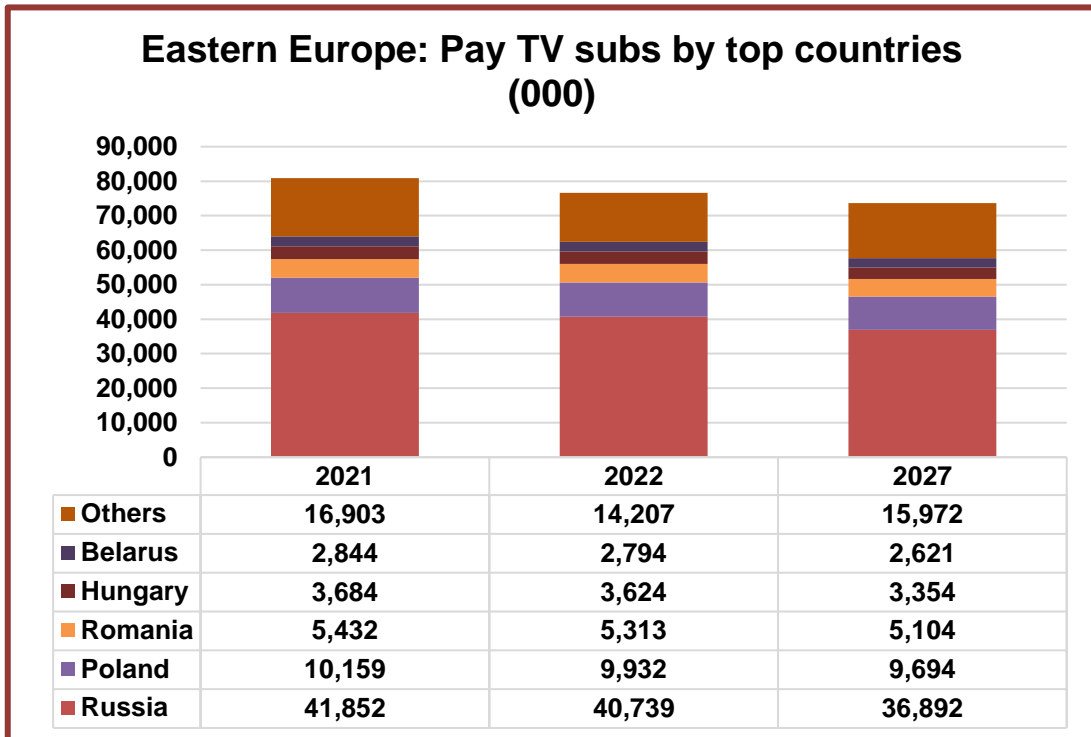


Eastern Europe to add nine million digital pay TV subs

Eastern European pay TV will fall from 82 million subscribers in the peak year of 2018 to 74 million in 2027. Peak year 2018 included 17 million analog cable subscribers, which will drop to zero by 2027. The number of digital pay TV subscribers will increase by 9 million over this period.



The number of pay TV subscribers will fall in 18 of the region's 22 countries between 2021 and 2027. The total will drop by 4 million in 2022 alone, mainly due to Ukraine losing all of its 2.6 million subscribers.

Simon Murray, Principal Analyst at Digital TV Research, said: "Russia will account for half of the region's pay TV subscribers in 2027. However, Russia will lose 5 million pay TV subscribers between 2021 and 2027 partly as sanctions worsen the economic situation and due to some analog cable homes converting to FTA DTT."

Sanctions on Russia are expected to continue for some time, with Western companies reluctant to re-enter the Russian market.

Russia is not as dependent on Western content as many other European countries. However, sanctions will result in economic hardship that will adversely affect Russian household spend. Pay TV subscriptions are cheap, so the sector will not be hit that hard.

Murray continued: "We assume that Russia will withdraw from Ukraine before end-2022. After the Russian withdrawal, we expect massive investment in Ukraine by Western companies/governments as well as most refugees returning home."

Eastern Europe Pay TV Forecasts

Table of Contents

Published in April 2022, this 148-page PDF, PowerPoint and excel report comes in three parts:

- Insight: Detailed country-by-country analysis in a 68-page PDF document.
- Outlook: Forecasts in a 25-page PowerPoint document full of charts, graphs and bullet points;
- Excel workbook covering each year from 2010 to 2027 for 22 countries by household penetration, by pay TV subscribers, by pay TV revenues and by major operator. As well as summary tables by country and by platform;

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

Forecasts for the following 22 countries and 85 operators:

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



SAMPLE: Bahrain pay TV insight

Pay TV penetration will not increase by much – reaching 33% by 2027. **Pay TV revenues** will be flat at \$27-30 million as competition cuts ARPUs.

Main assumptions behind the forecasts	
•	FTA satellite TV is the main TV reception platform – accounting for 63% of the TV households.
•	As well as satellite TV, OSN packages are available on most of the other pay TV platforms.
•	Batelco will remain the main pay TV platform.
•	Limited cable networks were phased out.
•	Analog terrestrial switch-off was achieved by end-2013.

Bahrain achieved complete **digital TV penetration** in 2013. About three-quarters of the 282,000 TV households receive digital satellite signals. IPTV subs have overtaken satellite TV.

Main operators by subscribers (000)				
Operator	Pay TV subs	Fixed bb subs	Mobile subs	SVOD platforms
Batelco	56	-	-	OSN
beIN	16	-	-	-
OSN	17	-	-	-
STC	-	-	-	Shahid VIP; OSN; Telly; Jawwy; Spuul
Zain	-	-	845	Netflix; Shahid VIP; Telly; Yupp

The dispute between Saudi Arabia and Qatar hit beIN's subscriber numbers across the region. Most governments followed the mid-2017 Saudi ban on beIN – although not all of them have enforced the ban that effectively. The ban was officially lifted in late 2021. **beIN** renewed several key sports rights, which will help to push its subscriber numbers back up.

Traditionally appealing to expatriates, **OSN** is attracting more local subscribers, although it dropped much of its sports coverage. OSN has exclusive deals with seven Hollywood studios. It will increase Arabic content to a quarter of the total.

OSN provides 41-47 channels for BHD16-35/month (\$42.11-92.11). We estimate that the company had 17,000 satellite TV subscribers by end-2021, falling to 11,000 in 2027 as OSN places more emphasis on its SVOD platform.

Batelco started offering IPTV services via its FTTH network (up to 500Mbps) in September 2011. Batelco had 56,000 IPTV subs at end-2021 and will have 66,000 by 2027. Batelco also offers OSN's SVOD platform (BHD4/month).

Principally a mobile operator, **STC (formerly called Viva)** carries OSN (BHD4/month), Jawwy TV (BHD3/month), Shahid VIP (BHD3/month) and Hindi-language Spuul (BHD2/month). STC is owned by Saudi Telecommunications Company.

Rival **Zain** carries Zee5 (BHD1.90/month), Apple TV+, Viu (BHD3/month) and Shahid VIP (BHD3/month). Zain is 55.4% owned by the Zain Group.

Digital terrestrial switchover, using the DVB-T2 standard, was completed in 2013, although its impact is limited because of the ready acceptance of other platforms.

SAMPLE: Bahrain pay TV forecasts

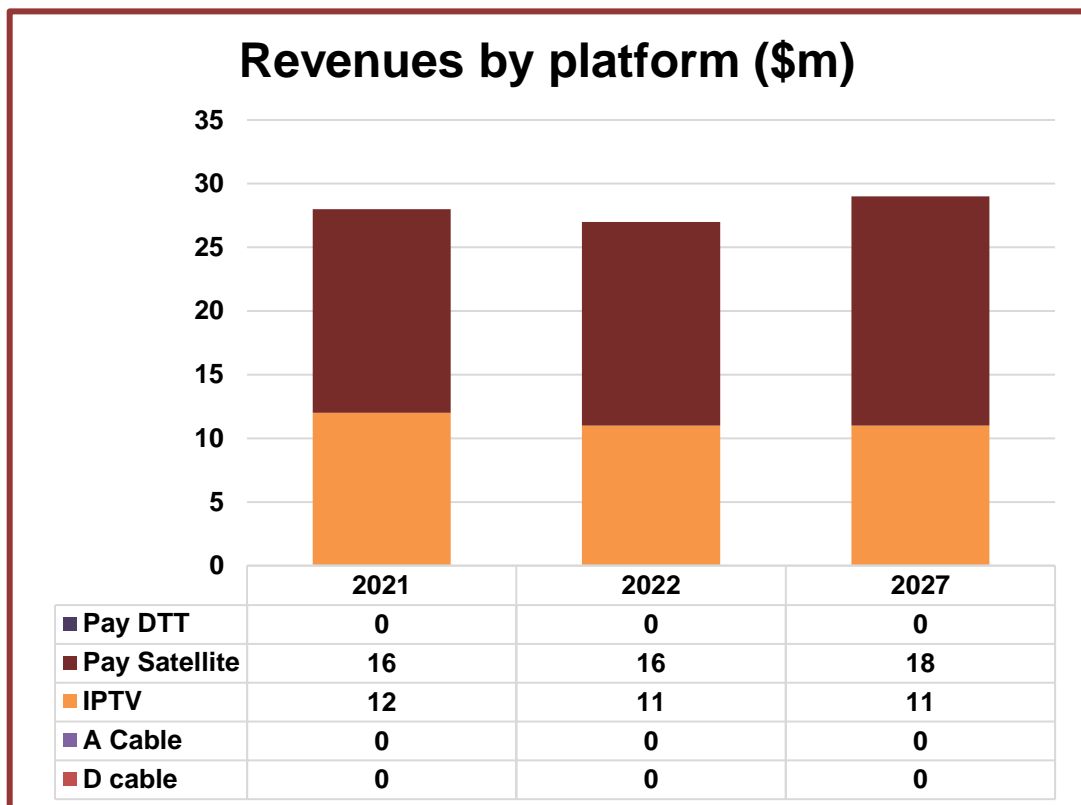
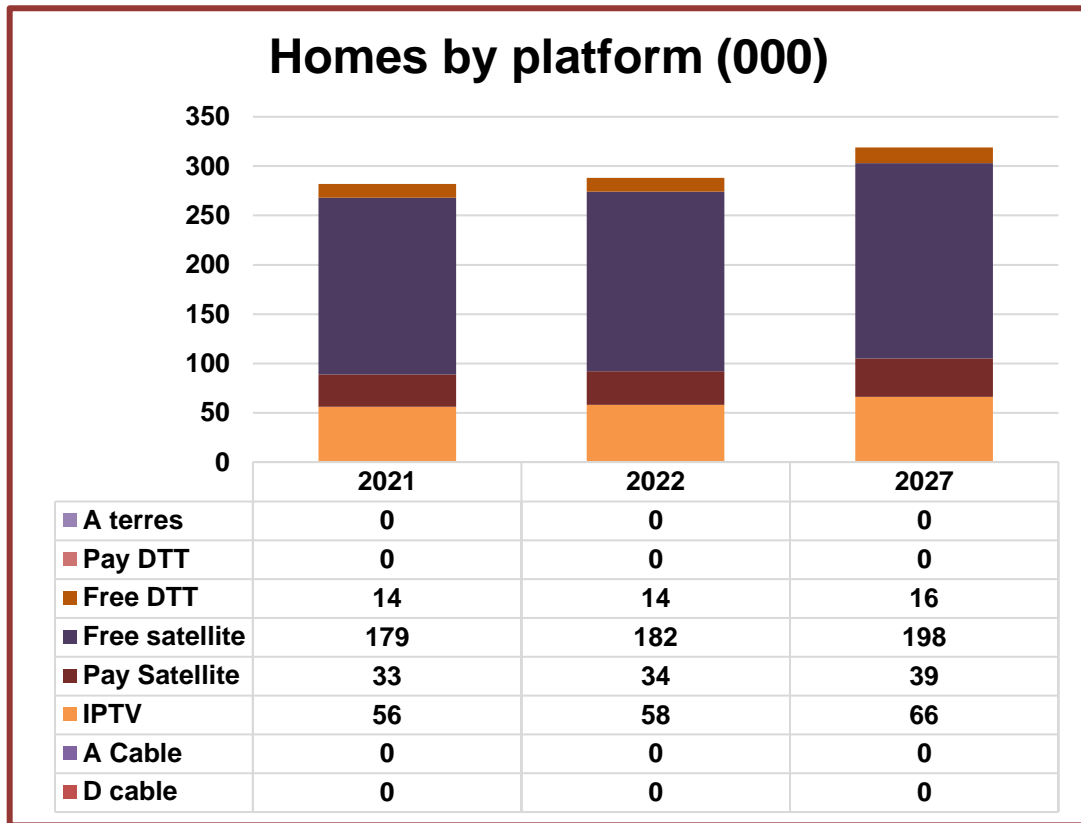
	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027
Total households (000)																		
TV households (000)																		
Digital cable subs (000)																		
Analog cable subs (000)																		
Pay IPTV subscribers (000)																		
Pay digital Satellite TV subs (000)																		
Free-to-air Satellite TV HH (000)																		
Analog terrestrial households (000)																		
Primary FTA DTT households (000)																		
Primary Pay DTT households (000)																		
Digital homes (000)																		
Analog homes (000)																		
Pay TV subscribers (000)																		
Digital cable subs/TV HH																		
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Primary FTA DTT/TV HH																		
Primary pay DTT/TV HH																		
TVHH/Total HH																		
Digital/TV HH																		
Analog/TV HH																		
Pay TV Subs/TV HH																		
Revenues (US\$ million)																		
Digital cable TV																		
Analog cable TV																		
IPTV																		
Satellite TV																		
DTT																		
Total revenues																		
Average Revenue Per User (ARPU - US\$)																		
Digital cable TV																		
Analog cable TV																		
IPTV																		
Satellite TV																		
DTT																		
Average monthly ARPU																		



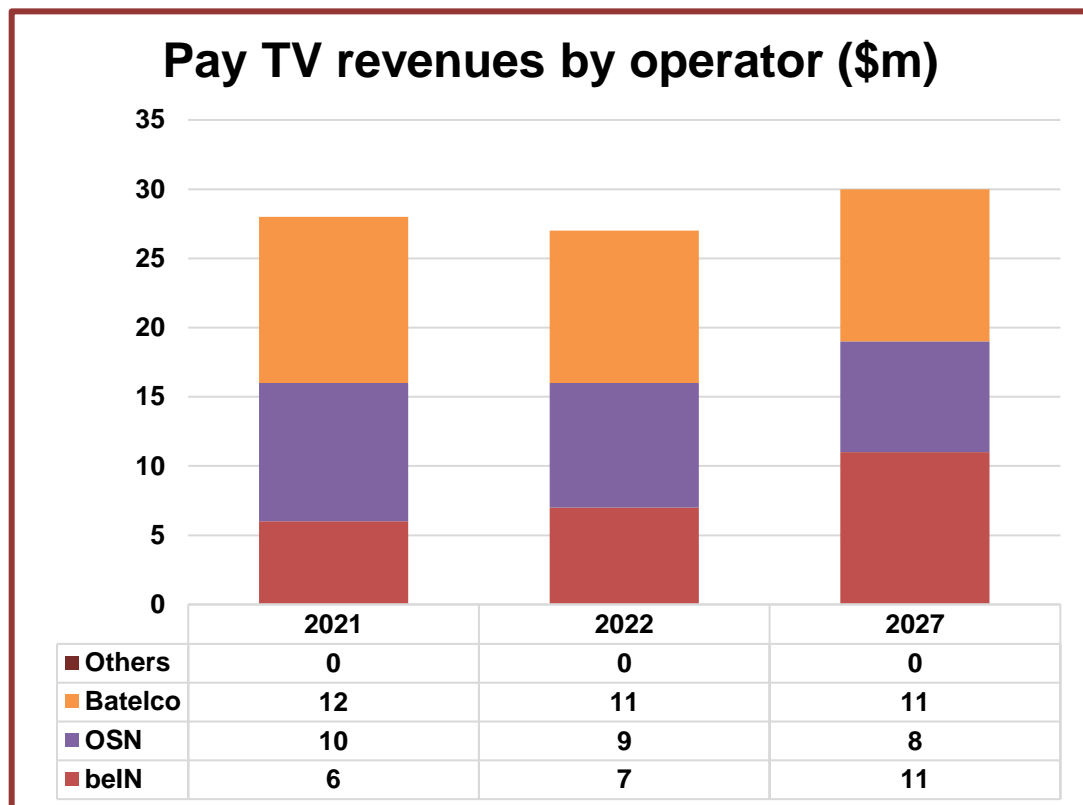
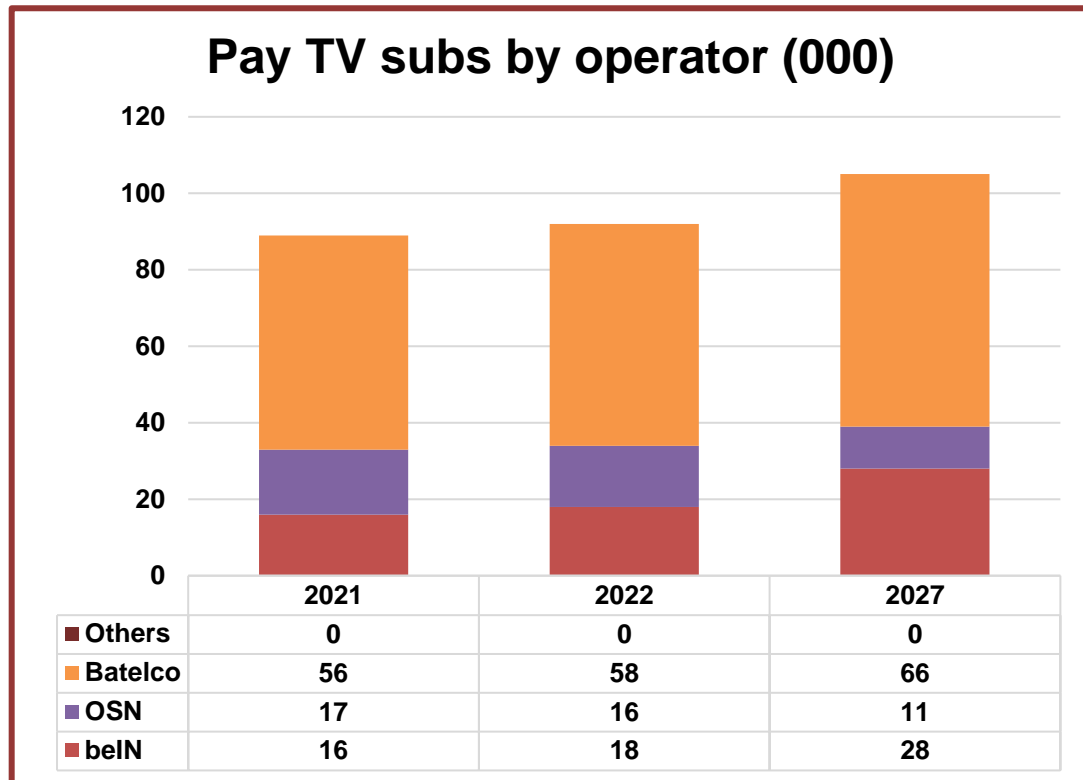
SAMPLE: Bahrain pay TV forecasts

	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027
Pay TV subscribers by operator (000)																		
belN (satellite)																		
OSN (satellite)																		
Batelco (IPTV)																		
Other																		
Share of pay TV subs by operator %																		
belN (satellite)																		
OSN (satellite)																		
Batelco (IPTV)																		
Other																		
Pay TV revenues by operator (\$ million)																		
belN (satellite)																		
OSN (satellite)																		
Batelco (IPTV)																		
Other																		
Share of pay TV revenues by operator %																		
belN (satellite)																		
OSN (satellite)																		
Batelco (IPTV)																		
Other																		

SAMPLE: Bahrain pay TV outlook



SAMPLE: Bahrain pay TV outlook



Digital TV Research report schedule for 2022

Title	Publication	Price
1 Africa Pay TV Forecasts	January	£1400/€1600/\$1875
2 Middle East & North Africa Pay TV Forecasts	January	£1400/€1600/\$1875
3 SVOD Forecasts Update (based on December 2021 results)	February	£1800/€2050/\$2400
4 Africa OTT TV and Video Forecasts	February	£1400/€1600/\$1875
5 Middle East & North Africa OTT TV and Video Forecasts	February	£1400/€1600/\$1875
6 North America Pay TV Forecasts	February	£700/€800/\$940
7 North America OTT TV and Video Forecasts	February	£700/€800/\$940
8 Latin America Pay TV Forecasts	March	£1400/€1600/\$1875
9 Latin America OTT TV and Video Forecasts	March	£1400/€1600/\$1875
10 Asia Pacific Pay TV Forecasts	March	£1400/€1600/\$1875
11 Asia Pacific OTT TV and Video Forecasts	March	£1400/€1600/\$1875
12 Western Europe Pay TV Forecasts	March	£1400/€1600/\$1875
13 Western Europe OTT TV and Video Forecasts	March	£1400/€1600/\$1875
14 Eastern Europe Pay TV Forecasts	April	£1400/€1600/\$1875
15 Eastern Europe OTT TV and Video Forecasts	April	£1400/€1600/\$1875
16 Global OTT TV & Video Forecasts	May	£2000/€2300/\$2600
17 Global Pay TV Forecasts	May	£2200/€2530/\$2970
18 Global AVOD Forecasts	May	£1800/€2050/\$2400
19 Global SVOD Forecasts (based on March 2022 results)	June	£1800/€2050/\$2400
20 Africa SVOD Forecasts	August	£1200/€1380/\$1600
21 Middle East & North Africa SVOD Forecasts	August	£1200/€1380/\$1600
22 Latin America SVOD Forecasts	August	£1200/€1380/\$1600
23 North America SVOD Forecasts	August	£600/€690/\$800
24 Eastern Europe SVOD Forecasts	September	£1200/€1380/\$1600
25 Asia Pacific SVOD Forecasts	September	£1200/€1380/\$1600
26 Western Europe SVOD Forecasts	September	£1200/€1380/\$1600
27 SVOD Forecasts Update (based on June 2022 results)	September	£1800/€2050/\$2400
28 Pay TV Forecasts Update	December	£2200/€2530/\$2970
29 SVOD Forecasts Update (based on September 2022 results)	December	£1800/€2050/\$2400

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