



MediaTech Market in Transition – Focus on the Middle East

IABM Business Intelligence Unit

November 2025



Saleha Williams
CEO - IABM

Shaping the Global MediaTech Landscape

Common themes in this keynote



Profitability

Media businesses focus on optimizing profitability as they pivot towards new business models at an accelerated rate



Transformation

Organizations need to recalibrate their business models and technology stack to operate effectively in the contemporary market



Agility

In a volatile and unpredictable global environment, organizations need to be able to adapt quickly to rapidly changing market conditions

Featured Report Content

Access full length reports on MediaTech Vantage™



Insights featured in this presentation are curated from IABM's Business Intelligence report portfolio



State of MediaTech

Twice Annual Flagship report – Latest Edition Published at IBC



GeoTracker

Annual Tracker Report - Available Now



TechTracker

Annual Tracker Report - Available Now

Business Intelligence at IABM

Overview of the reports



Insights Available

Market Outlook & Landscape

Investment Roadmaps

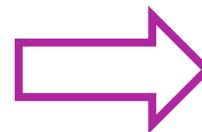
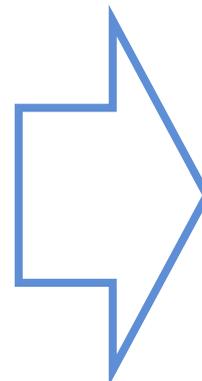
MediaTech Vendor Business Models

Market Development by Product Category & Customer Segment

Deep Dive on Leading Technologies receiving Investment

Geographic Market Development

Emerging Innovation



IABM Business Intelligence Report Title

State of MediaTech – NAB Show

State of MediaTech – IBC Show

ChainTracker™

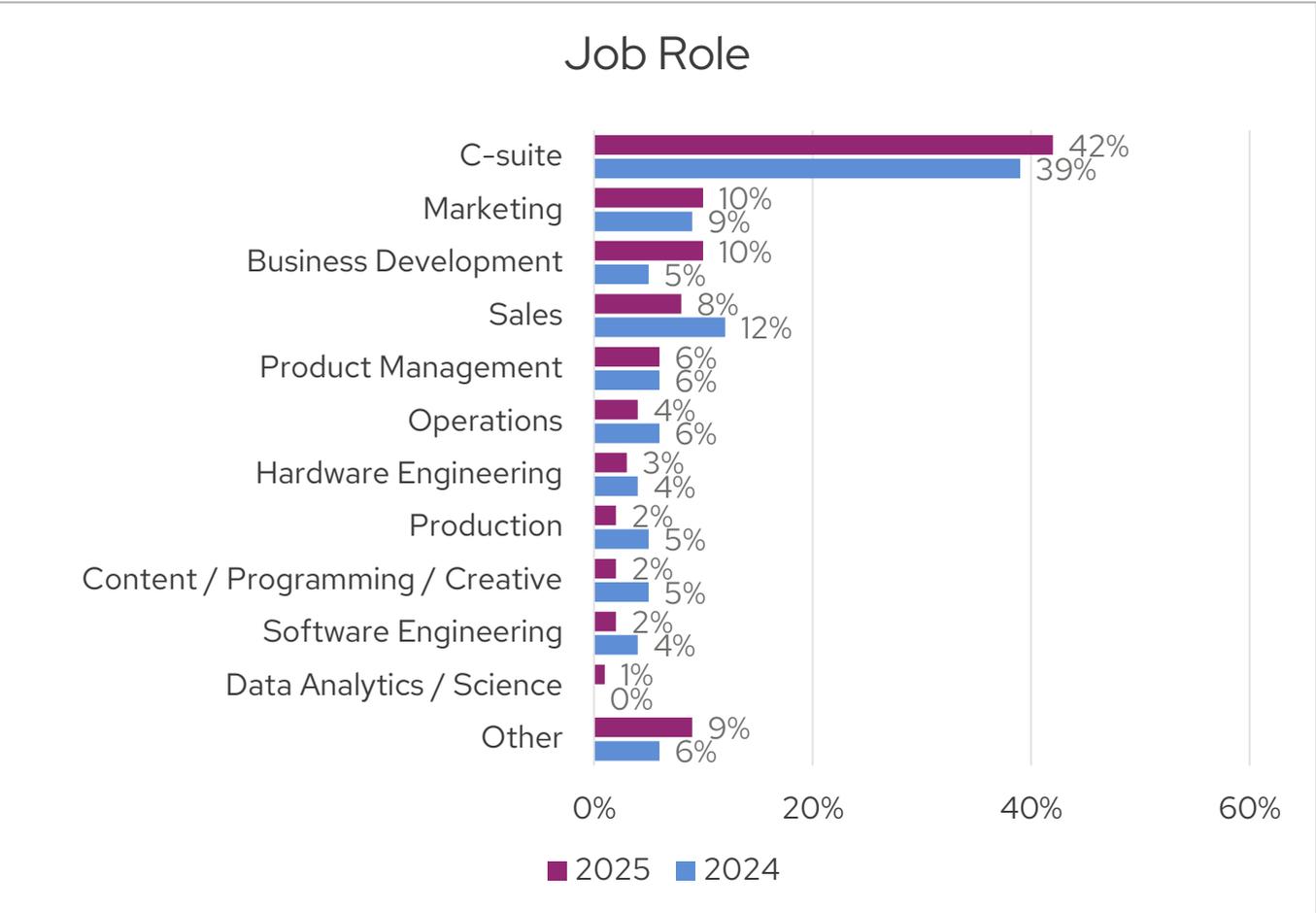
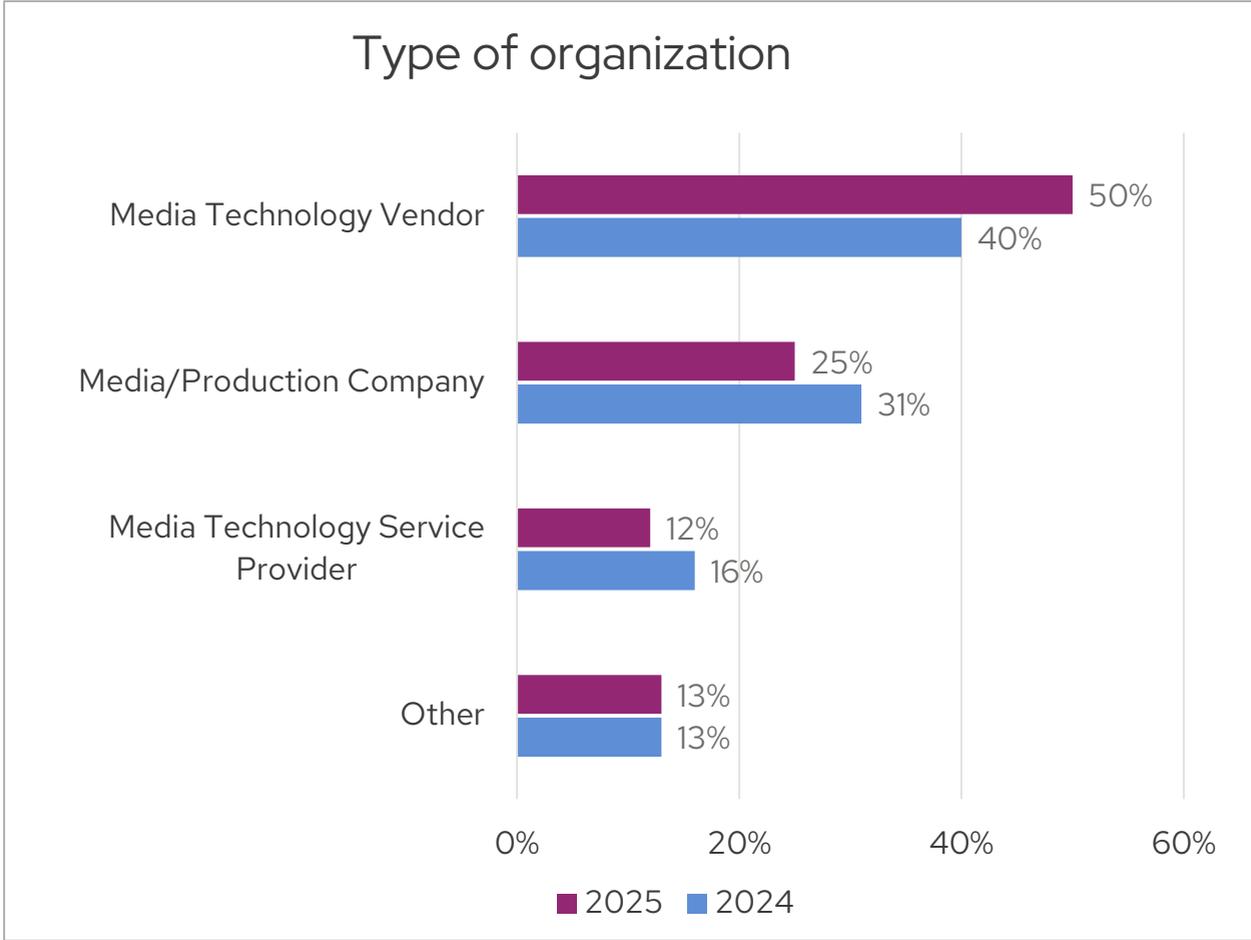
TechTracker™

GeoTracker™

Megatrends Series

MediaTech Industry Tracker

Survey includes organizations of all types, with 42% of respondents at C-level



The "Other" category includes: Consulting, Corporate, Education/Training, Freelancing, Government/Military, Sports, Marketing/Advertising Agencies, Healthcare, Live Music

The "Other" category includes: Data Analytics and Science, Engineering, R&D, Consulting and Strategy, Management, Support, and Services.

Source: IABM MediaTech Industry Tracker

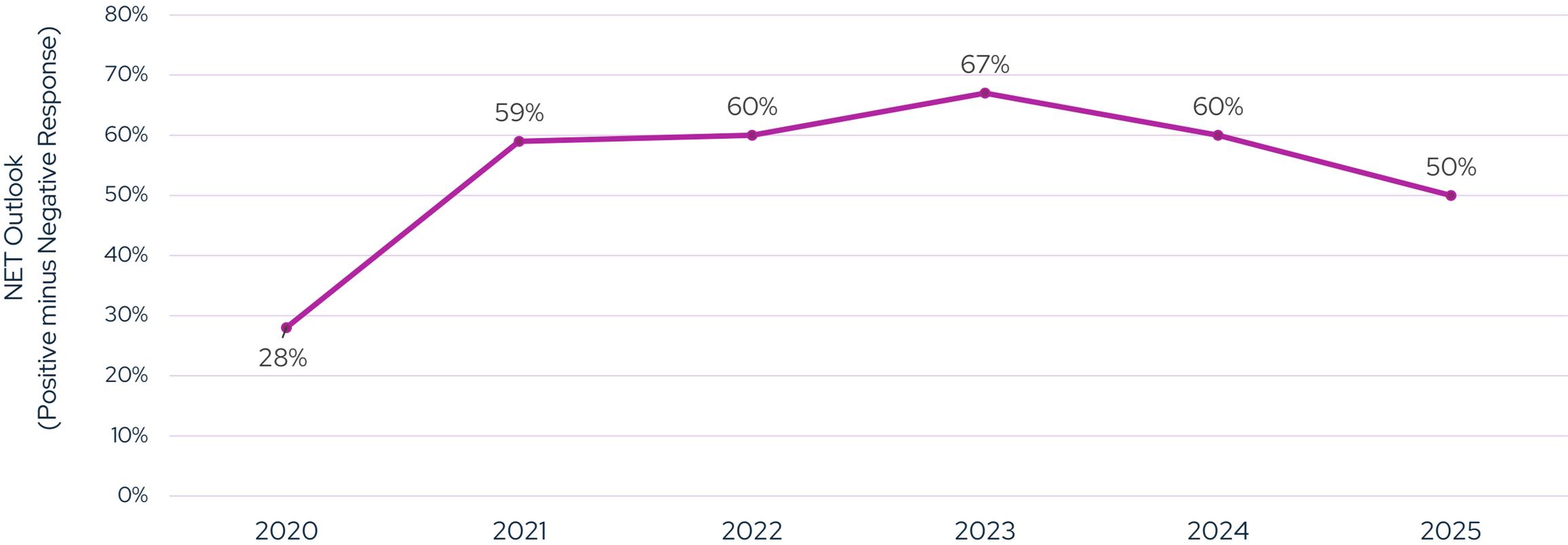
The Business Environment – Global View

Business Environment

The business environment outlook has worsened compared to last year



MediaTech Business Environment NET Outlook



Q. What is your organization's outlook for the overall business environment over the next year? (All Industry)

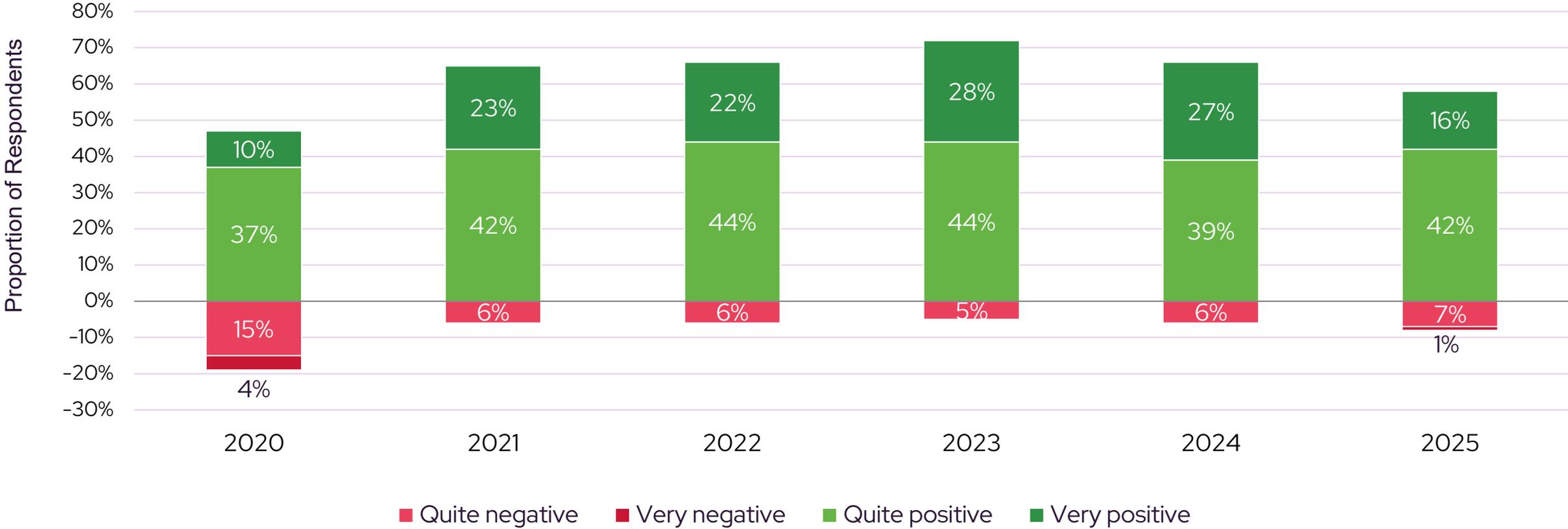
Source: IABM MediaTech Industry Tracker

Business Environment

Strength of positivity in business environment outlook has lessened



MediaTech Business Environment Outlook



Q. What is your organization's outlook for the overall business environment over the next year? (All Industry)

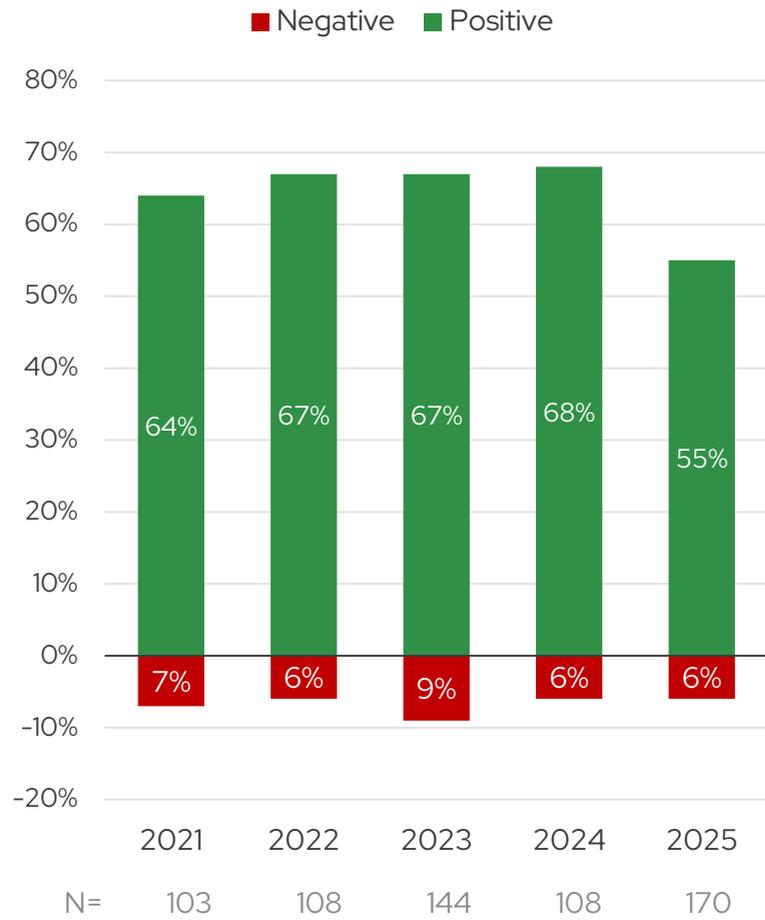
Source: IABM MediaTech Industry Tracker

Business Environment

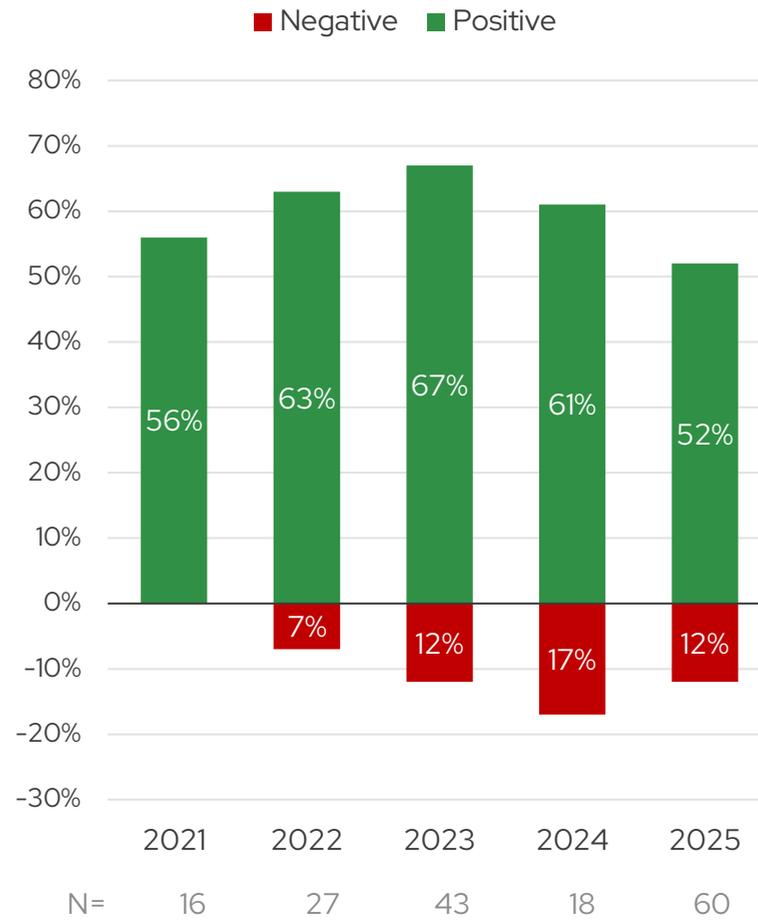
The decline in business confidence is mainly attributed to EMEA & APAC



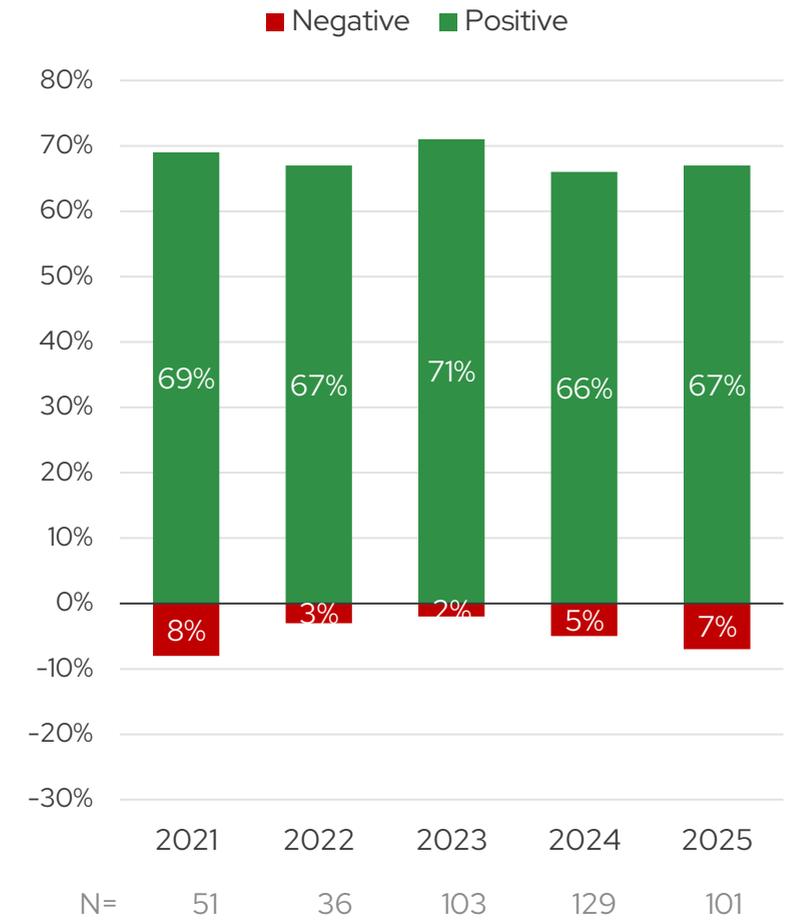
EMEA



APAC



Americas



Source: IABM MediaTech Industry Tracker

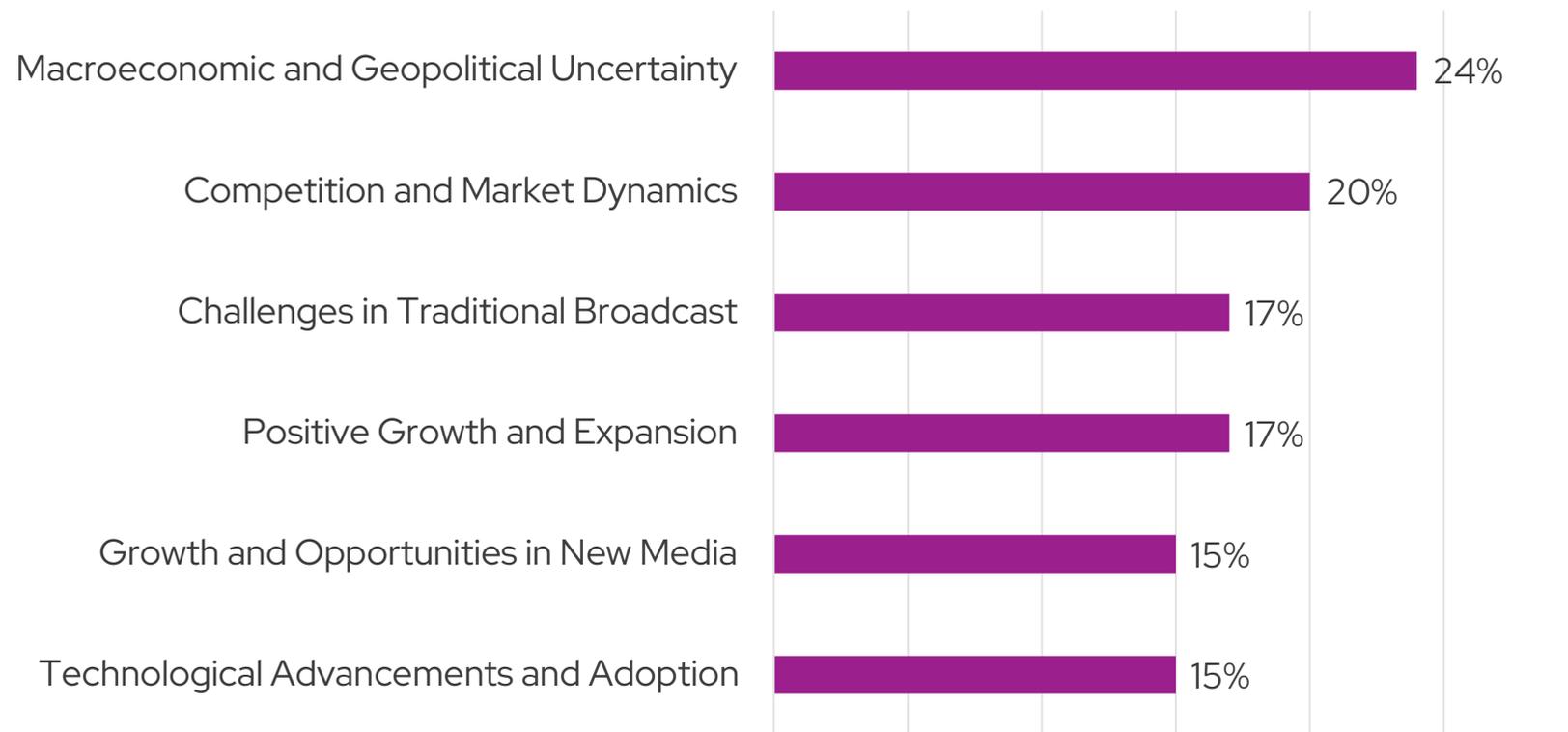
Q. What is your organization's outlook for the overall business environment over the next year?

Business Environment

Uncertainty continues to inhibit decision making



Sentiment Analysis of Additional Comments Made on Business Environment



Q. What is your organization's outlook for the overall business environment over the next year? Based on text analysis of open-ended responses. (All Industry. Sample size 2025 n=46)

"Stiff competition (especially globally), tough investments and upgrading period, combined with handling old tech and obsolete buildings/tech. Between a rock and a hard place..."

"The industry seems energized and coming out of the supply issues which created excess inventory that has almost been burned through. Macroeconomics and geopolitics are a big uncertainty for everyone though."

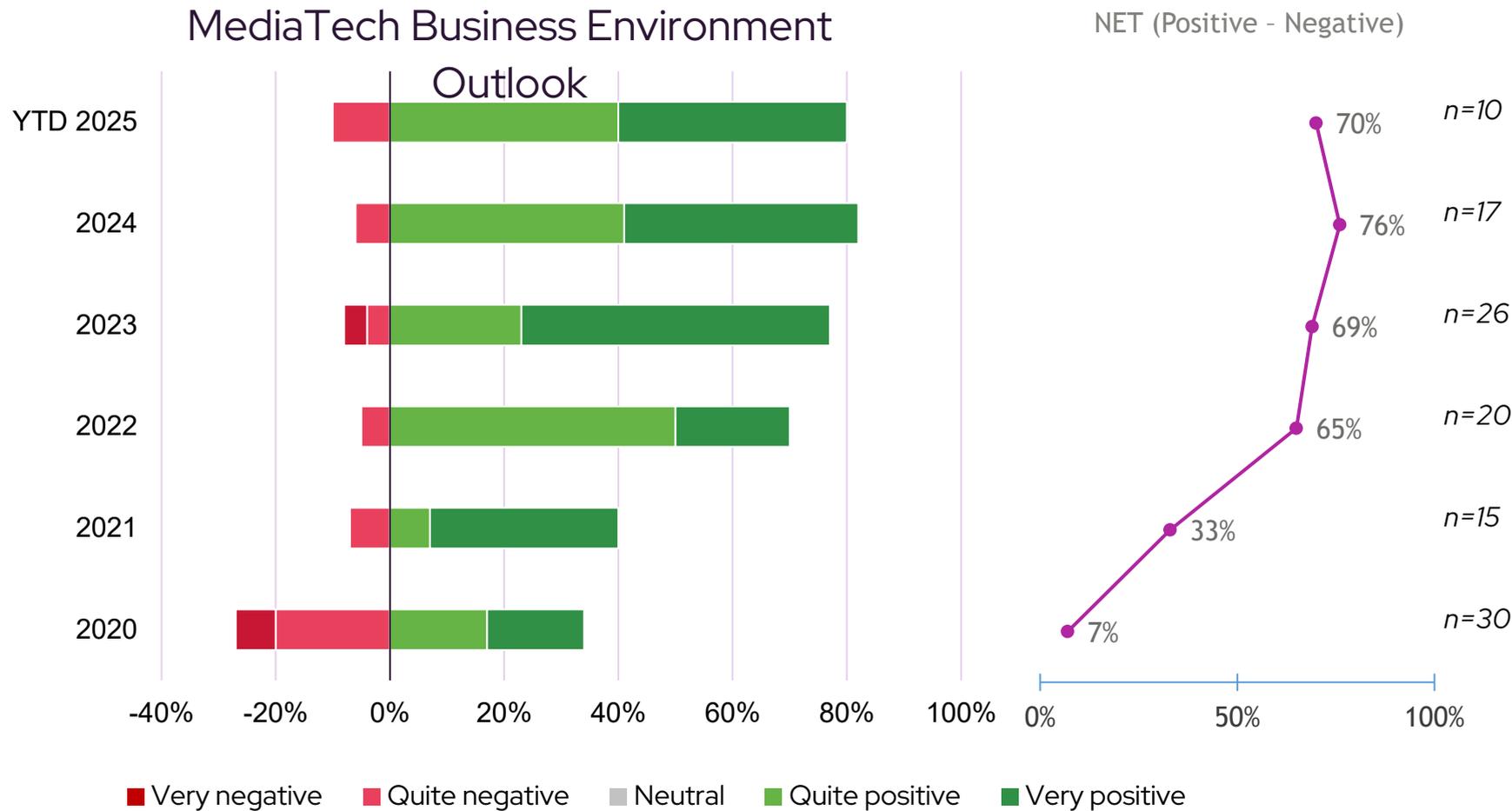
"There is a great deal of uncertainty due to the political climate, FCC deregulations, and the future of NextGen TV."

Source: IABM MediaTech Industry Tracker

The Business Environment – MENA

Business Environment – MENA

The outlook remains positive driven by investments in digital transformation



Q. What is your organization's outlook for the overall business environment over the next year? (Middle East & Africa)

- Government funding:** Solid government funding, favorable policies and tech investment in digital transformation, especially in the Gulf countries, is keeping the business environment outlook positive despite rising geopolitical tensions and changes in global trade policies.
- OTT:** The OTT boom in the region is shifting the investment focus of media businesses to social media and digital platforms, reducing investment in physical hardware and equipment.
- Live sports:** The Gulf countries' significant investment in media rights of premium live sports and engaging experiences (e.g. gaming) are accelerating the adoption of IP, Cloud and AI.

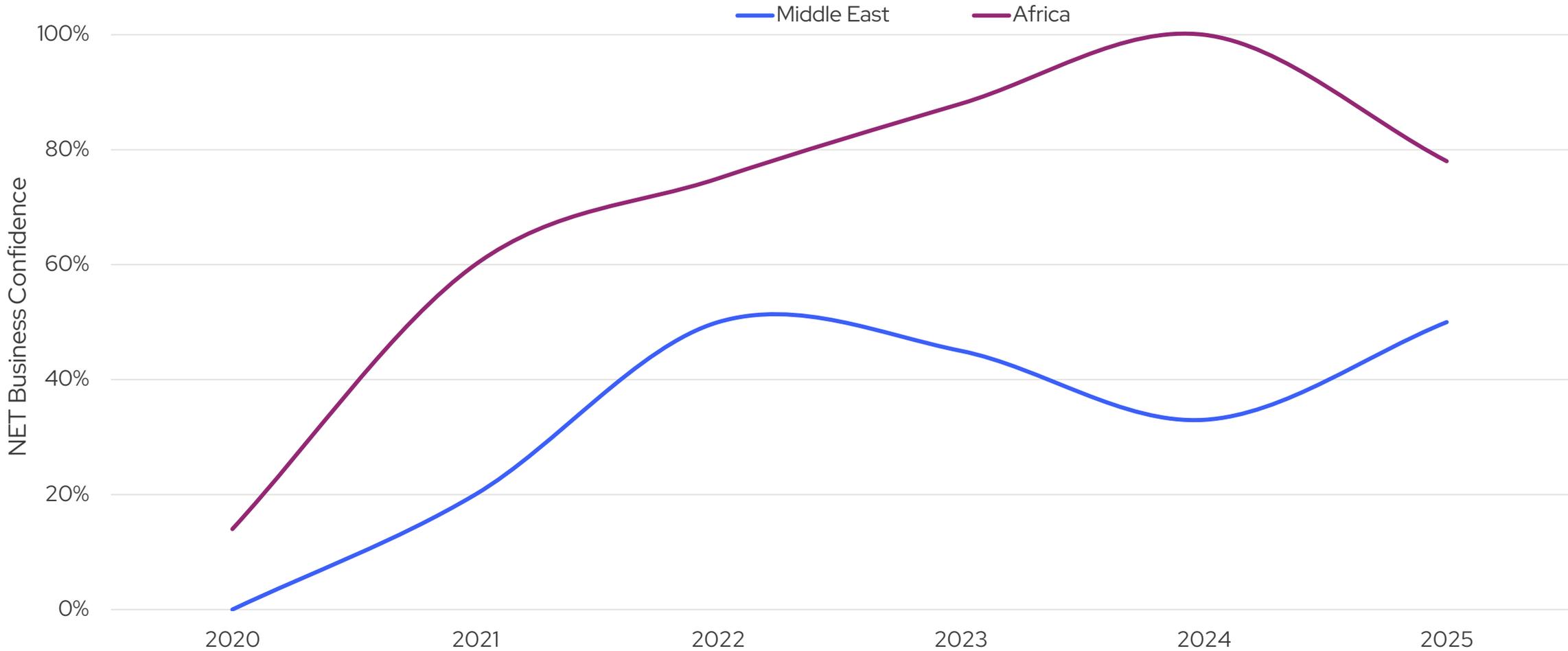
Source: IABM, The Economist Intelligence Unit, CNN

Business Environment – MENA

The business confidence in the MENA region is growing, being opposite to Africa



MediaTech Business Environment Outlook



Q. What is your organization’s outlook for the overall business environment over the next year? (Middle East & Africa)

Source: IABM

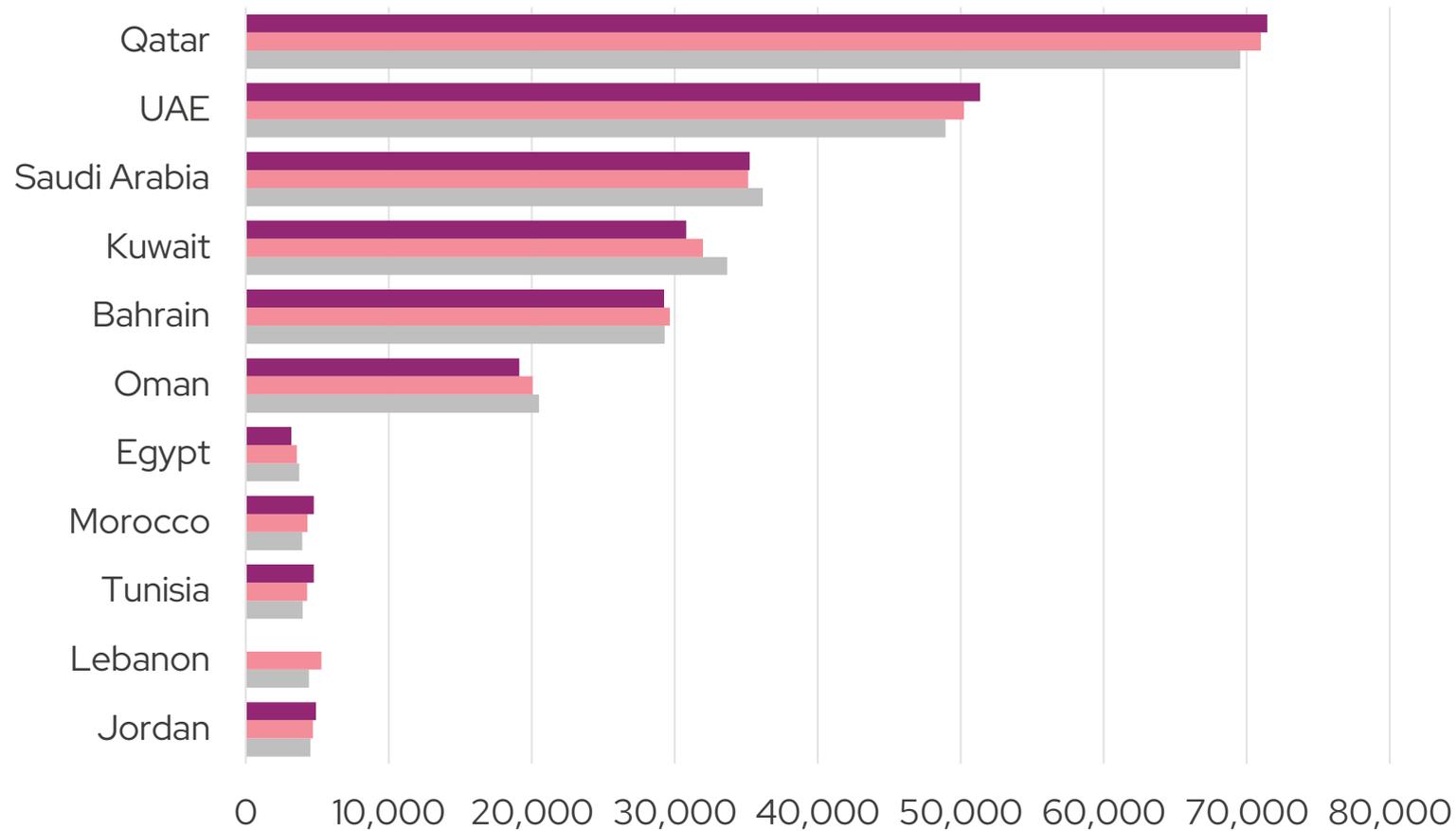
Business Environment – MENA

Gulf countries are driving economic growth in the region, inducing M&As

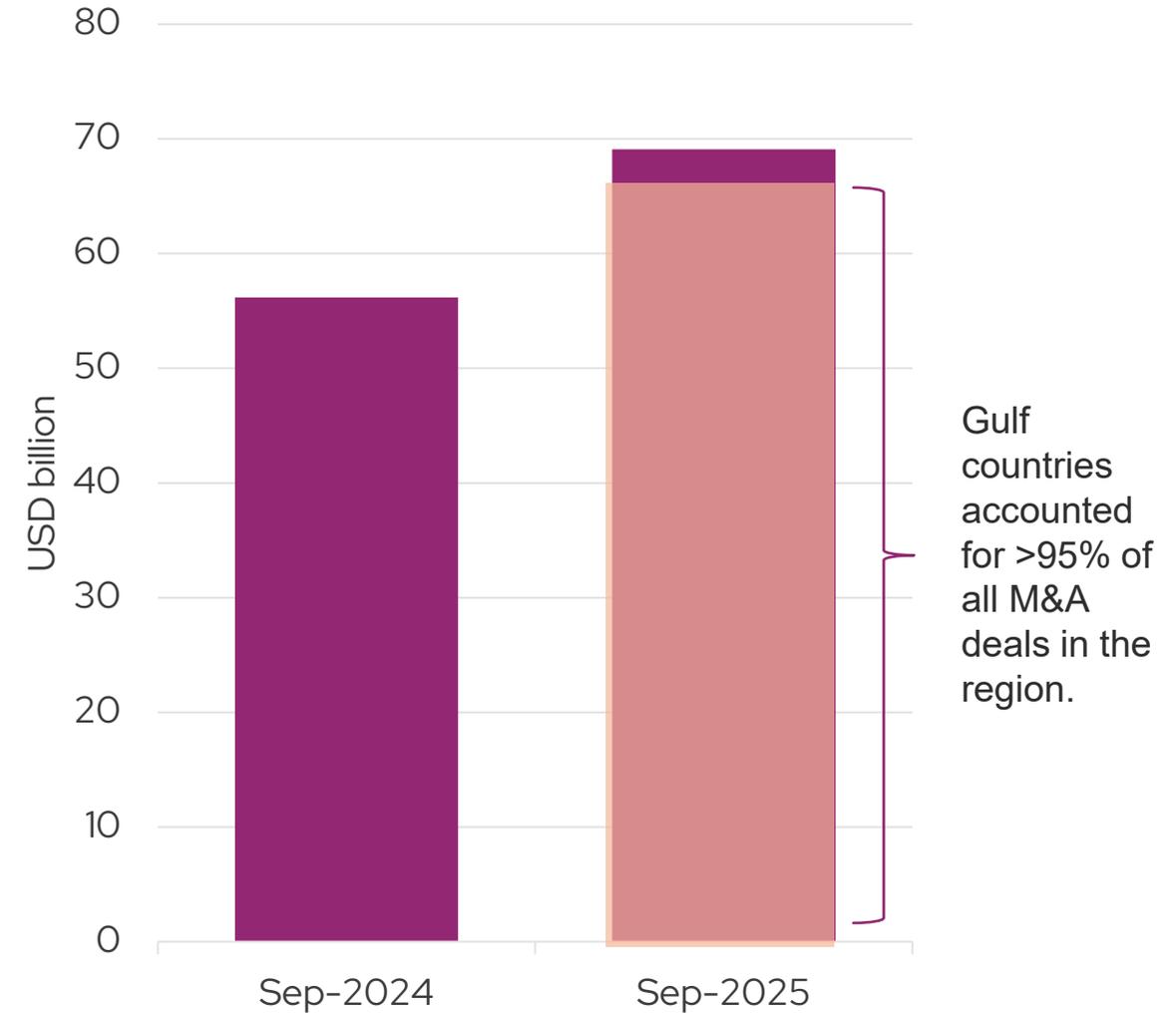


Nominal GDP per capita by country in MENA

■ 2025E ■ 2024 ■ 2023



M&A activity in MENA



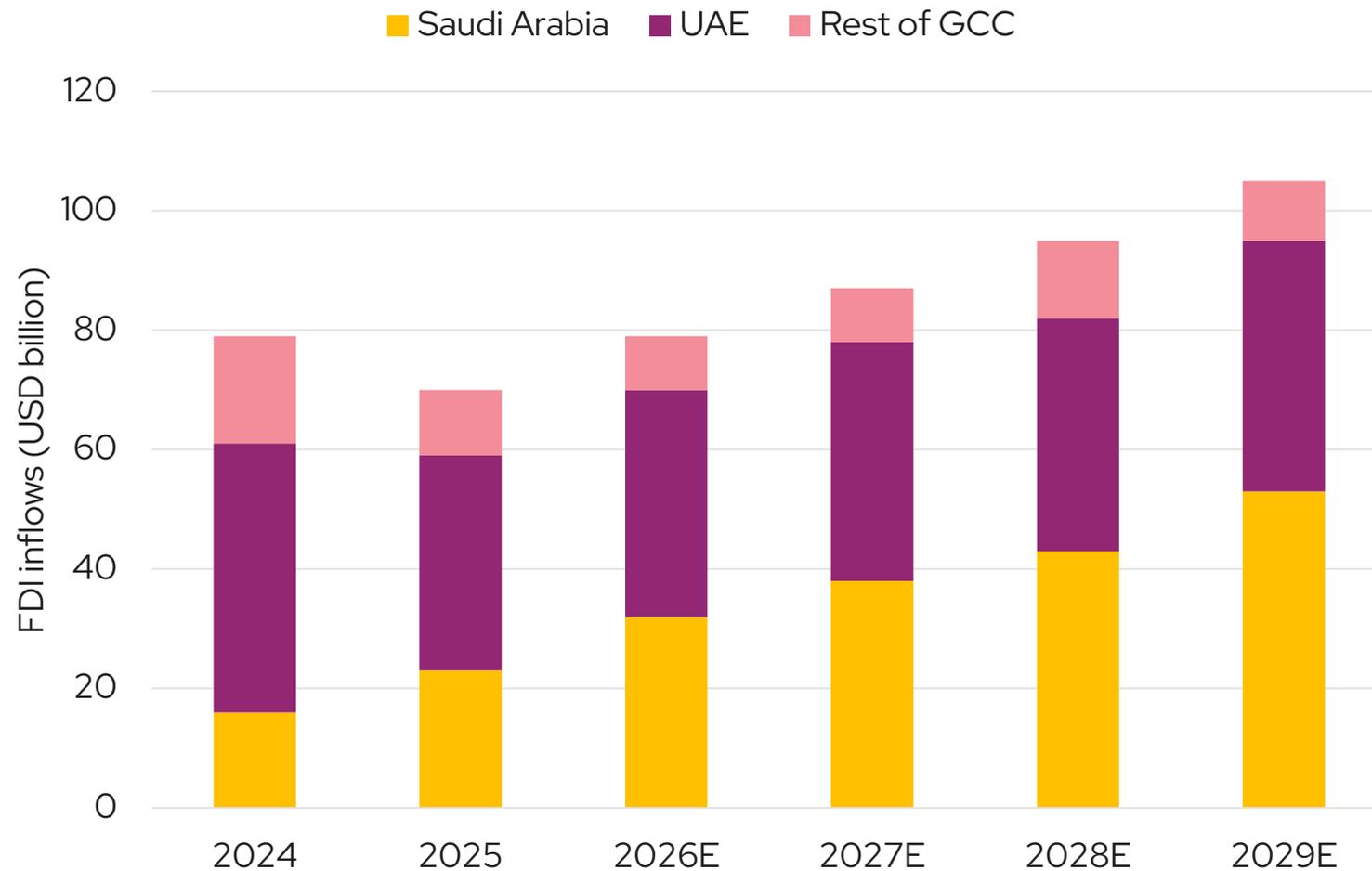
Source: IABM, IMF (October 2025), EY

Business Environment – MENA

GCC countries continue to diversify their economies by investing in AI infrastructure



Foreign direct investment in GCC – Forecast



HUMAIN's CEO in a CNN interview at the Future Investment Initiative in Saudi Arabia

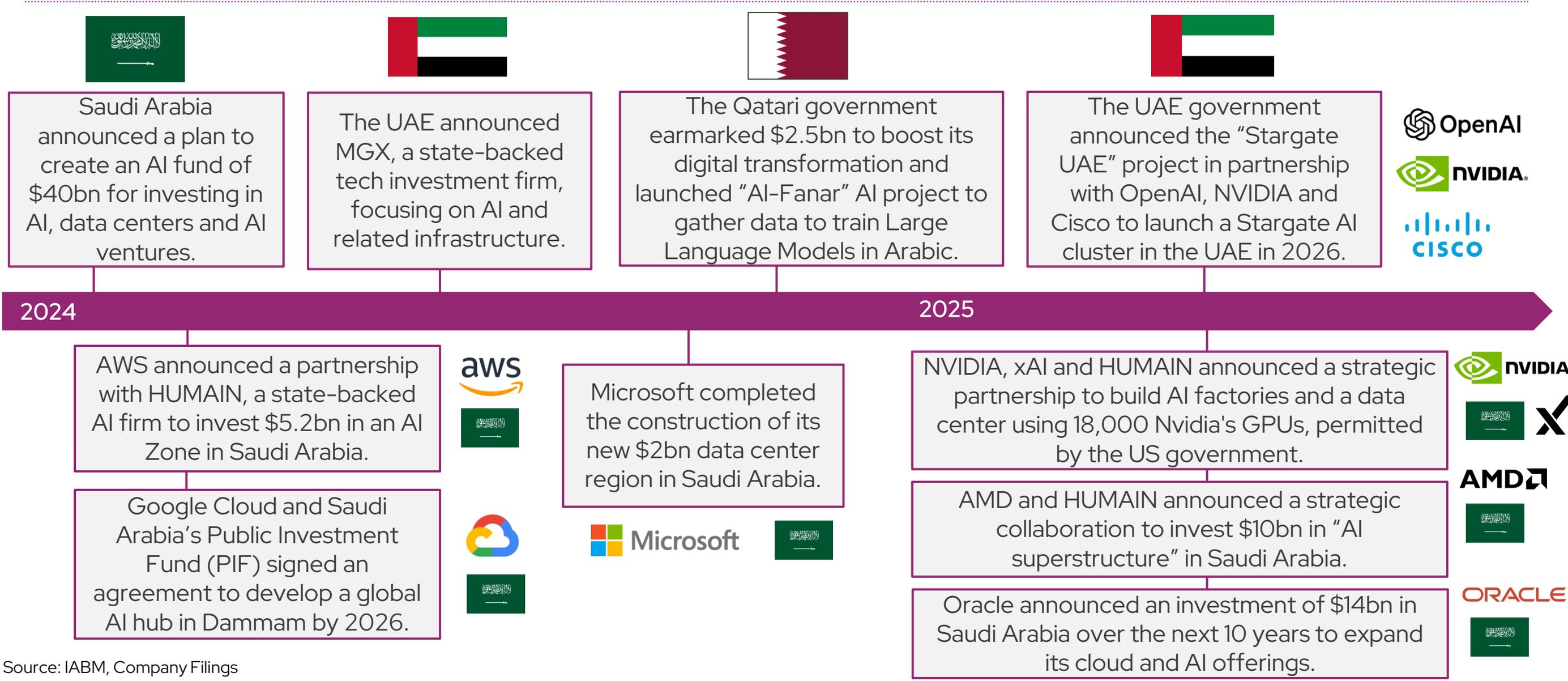
*We have an advantage in Saudi Arabia. Look at this country's amazing **energy grid** that doesn't require a company like **HUMAIN** [state-funded AI ecosystem] to build the substations and the power to deliver that to a data center. That means I have saved 18 months of time.*

Tareq Amin
CEO
Humain
(November 2025)

Source: IABM, The Economist Intelligence Unit, CNN

Business Environment - MENA

Gulf governments' national AI strategies are paying off, inducing FDI



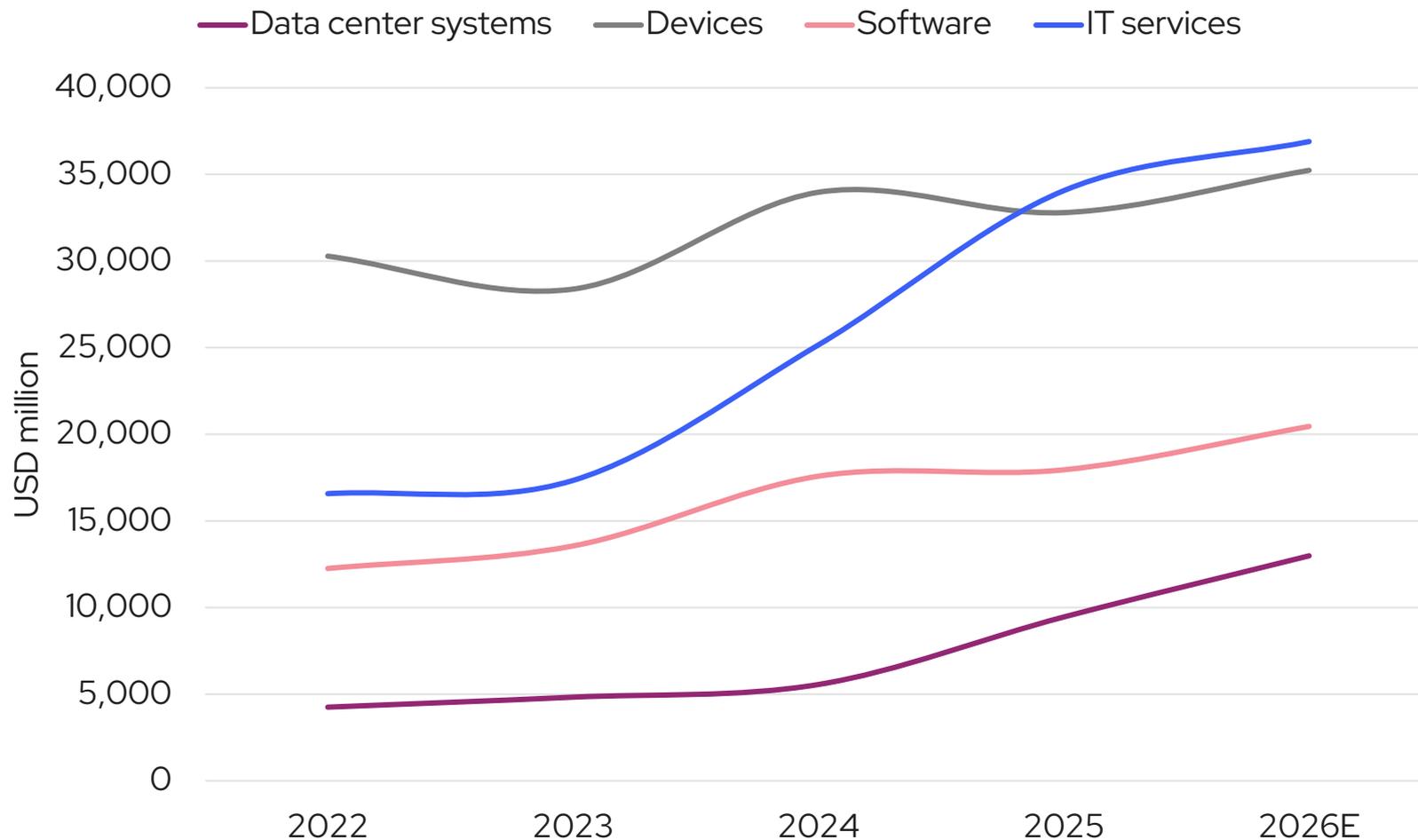
Source: IABM, Company Filings

Business Environment – MENA

IT spending will continue to grow, driven by national digitalization strategies



Spending on IT in MENA - Forecast*



AWS announced a strategic partnership with HUMAIN to invest \$5bn in an “AI Zone” in Saudi Arabia

This collaboration [with HUMAIN] to build an AI Zone in Saudi Arabia will enable innovations across all industries using AWS’s advanced AI offerings, and reflects our commitment to support Saudi Arabia’s Vision 2030.

Matt Garman
CEO
Amazon Web Services
(May 2025)

Source: IABM, Gartner (August 2025). Note: Excluding Communication Services.

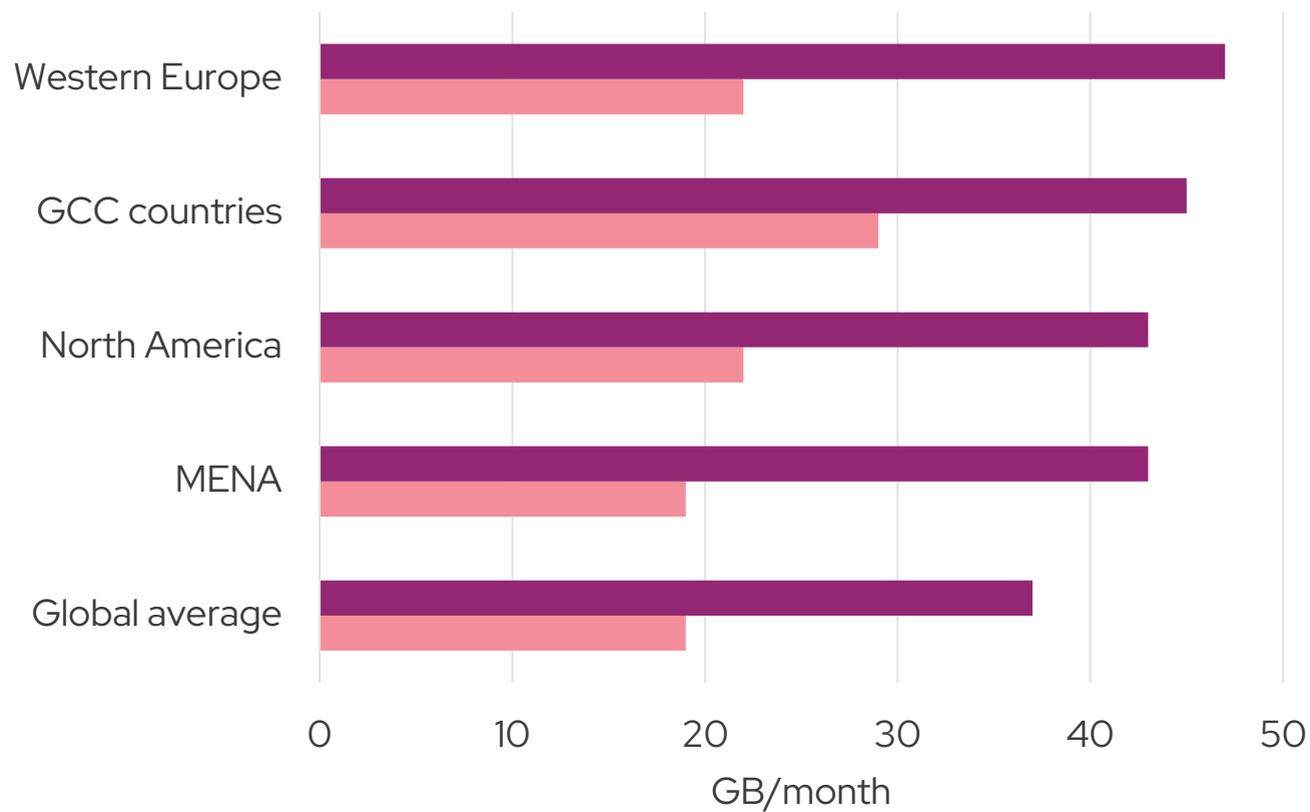
Business Environment – MENA

Mobile data traffic is expected to skyrocket, driven by Gen AI on smartphones

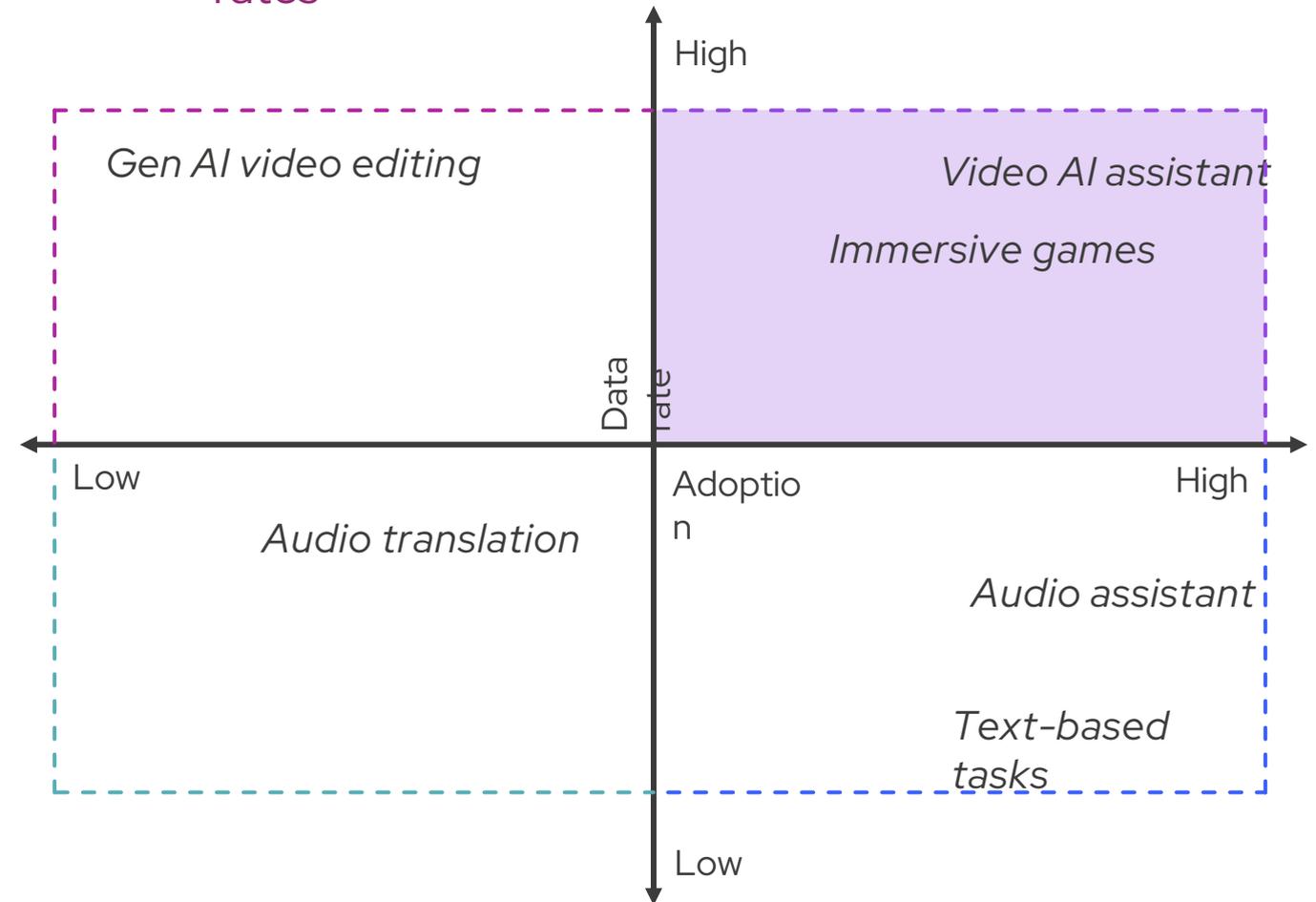


Mobile data traffic per active smartphone, by region

2030 2024



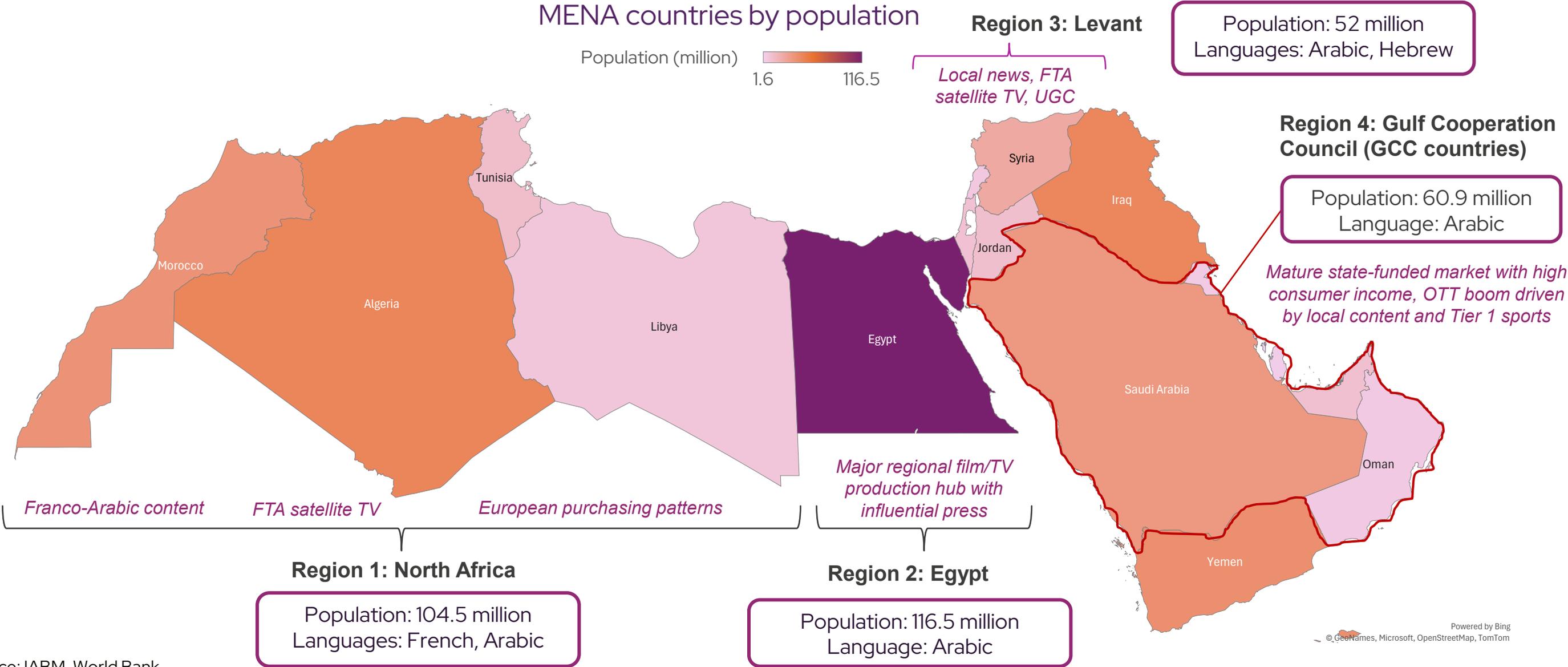
Gen AI applications, adoption vs. data rates



Source: IABM, Ericsson Mobility Report 2025

Business Environment – MENA

MENA market consists of several sub-regions with unique characteristics



Source: IABM, World Bank

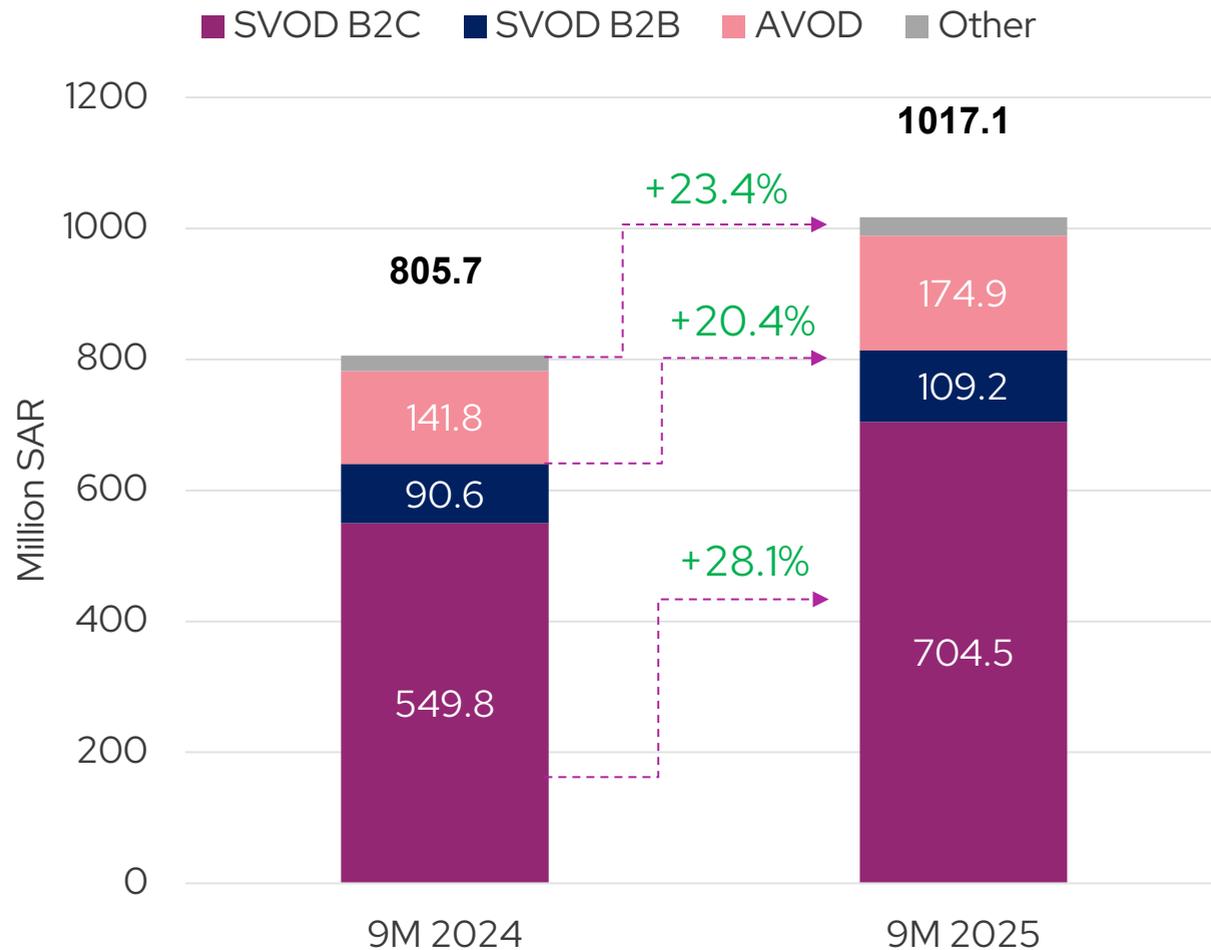
Powered by Bing © GeoNames, Microsoft, OpenStreetMap, TomTom

Business Environment – MENA

Gulf countries' OTT boom is driven by live sports and local content



MBC Shahid OTT service – Revenue breakdown



Source: IABM, Company Filings, maaal.com

MBC Group in an interview with Maaal

Audience engagement remained strong, supported by a diversified sports content lineup, including recently added major European leagues alongside high-engagement sports programs. While the exit of certain sports rights had a short-term revenue impact, overall sports engagement exceeded expectations, reflecting SHAHID's strength in non-league sports content and its broader entertainment portfolio.

Mike Sneesby
CEO
MBC Group
(November 2025)

Business Environment – MENA

Gulf countries are investing in sports and gaming, accelerating convergence



Major sporting events in the Gulf countries in 2025

	Tier 1	Tier 2	Tier 3
Saudi Arabia	<ul style="list-style-type: none"> F1 Grand Prix Saudi Arabia, Supercoppa Italiana WTA Tour Finals, ATP Next Gen Finals LIV Golf Riyadh World Rally Championship Final FIBA Asia Cup Supercopa de Espana 	<ul style="list-style-type: none"> AFC Champions League Elite Finals AFC Asian U17 Cup UIM E1 World Championship (boat racing) Islamic Solidarity Games Saudi Games The Saudi Cup UFC Night Fight WWE Premium Live Event 	<ul style="list-style-type: none"> Esports World Cup
UAE	<ul style="list-style-type: none"> F1 Grand Prix Abu Dhabi DP World Tour Championships 2025 Golf Championship Dubai World Cup 2025 (horse racing) 2025 EuroLeague Final Four 	<ul style="list-style-type: none"> Mubadala Abu Dhabi Open WTA-500 Dubai Duty Free Tennis Championships ATP-500 	<ul style="list-style-type: none"> Dubai eSports and Games Festival
Bahrain	<ul style="list-style-type: none"> F1 Grand Prix Bahrain Bahrain ATP Challenge Asian Youth Games FIBA 3x3 World Tour Final 	<ul style="list-style-type: none"> Bahrain Turf Series (horse racing) 	
Kuwait	<ul style="list-style-type: none"> Arabian Gulf Cup 	<ul style="list-style-type: none"> Badminton Heros Cup 2025 Padel World Cup Pair 	
Oman	<ul style="list-style-type: none"> Oman Rally, GCC Beach Games 	<ul style="list-style-type: none"> Oman Marathon 2025 	

Example deals to drive engagement



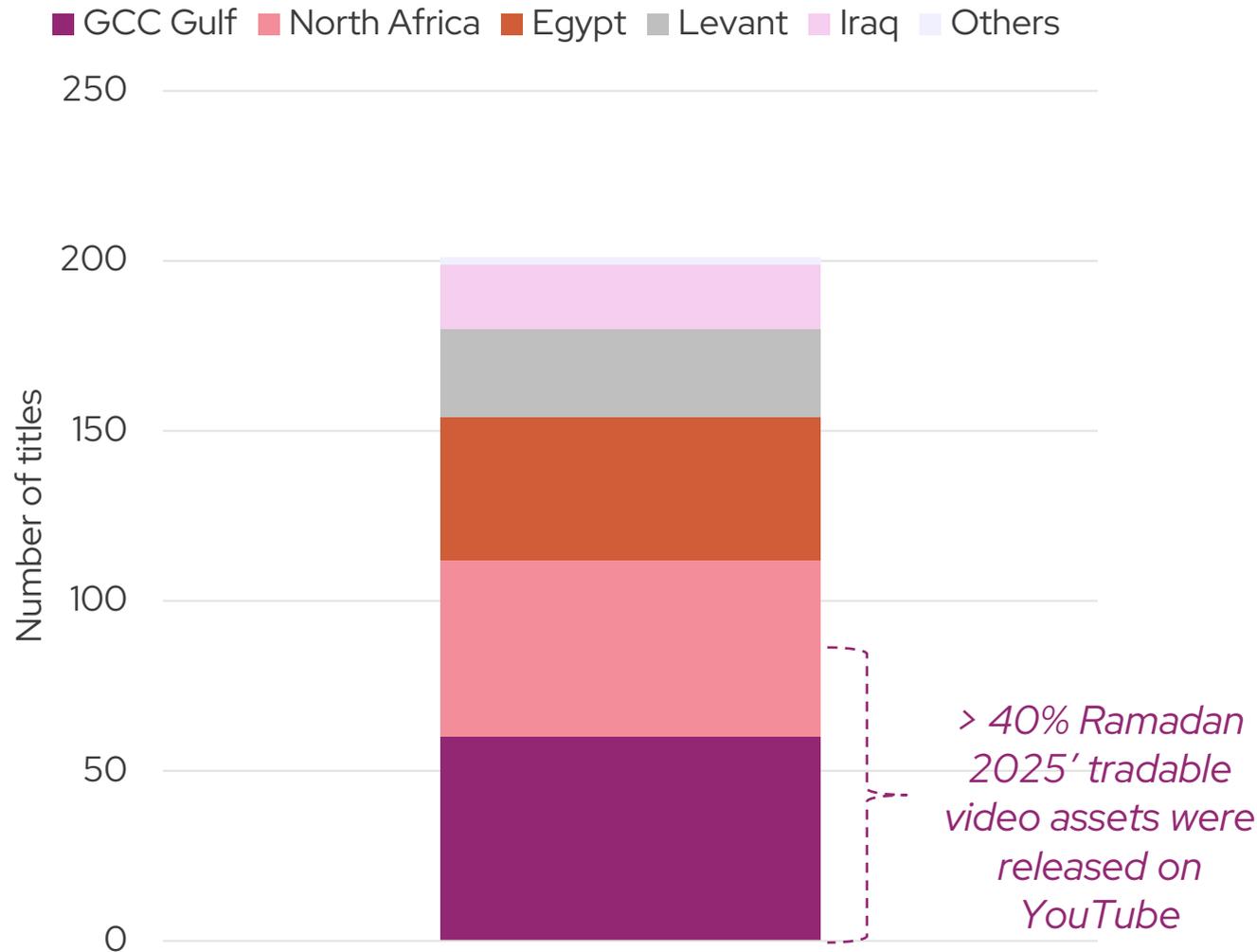
Source: IABM, Timeout Dubai, alarabiya.net, hanovercomms.com, Company Filings

Business Environment – MENA

Media businesses are turning to social media targeting younger audiences



Series released during Ramadan 2025



Source: IABM, Media Rating Company (MRC)

GEP Insight

MediaTech buyer in an IABM interview

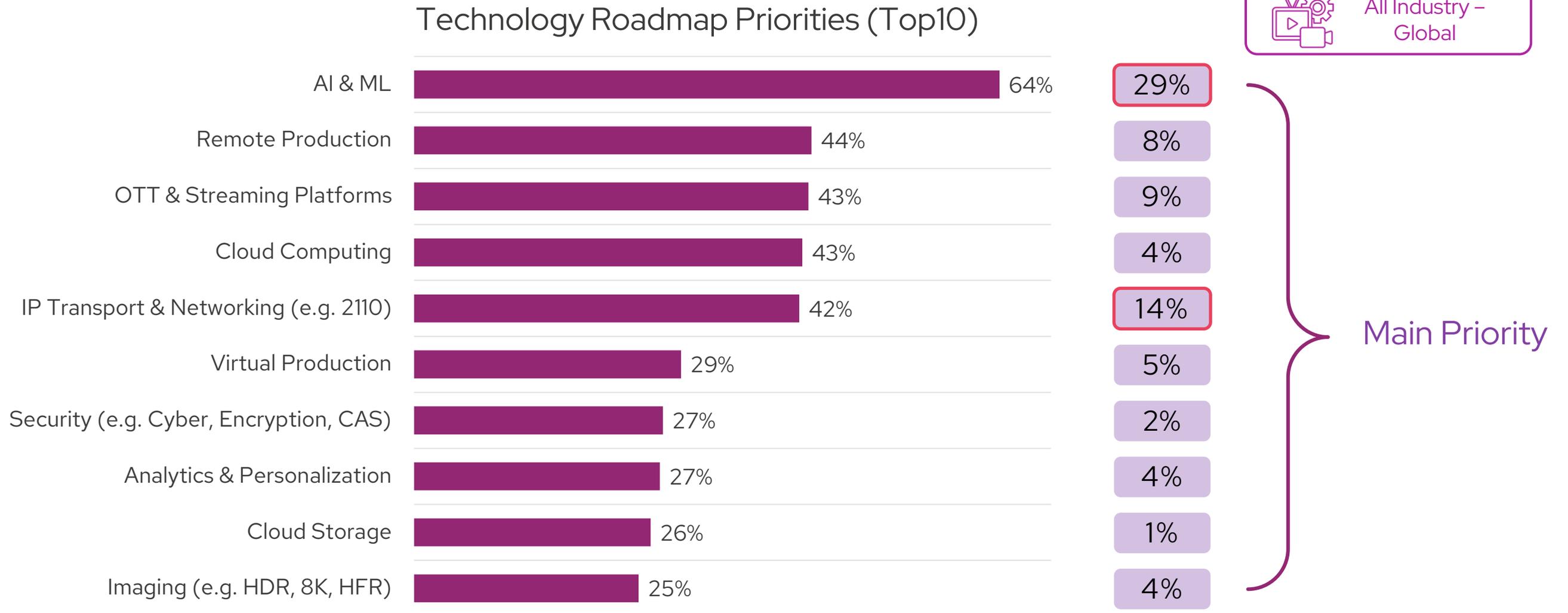
*We are expanding on all social media platforms like Facebook, X, YouTube, WhatsApp, Telegram, TikTok, Snapchat. [...] To watch TV people are heading towards live streaming on social media like YouTube Live stream. [...] In the long term, we need to digitize the content itself so we are trying to go from horizontal to **vertical screen** – especially with **Gen Z** – which is growing. They will be our main target audience.*

Public service broadcaster
Middle East
(February 2025)

WHERE IS INVESTMENT GOING?

MediaTech Investment

AI continues to grow, maintaining its position as the main priority in tech roadmaps



Q. What are the most important trends in your organization's technology roadmap? (All industry, 2025, n=300)

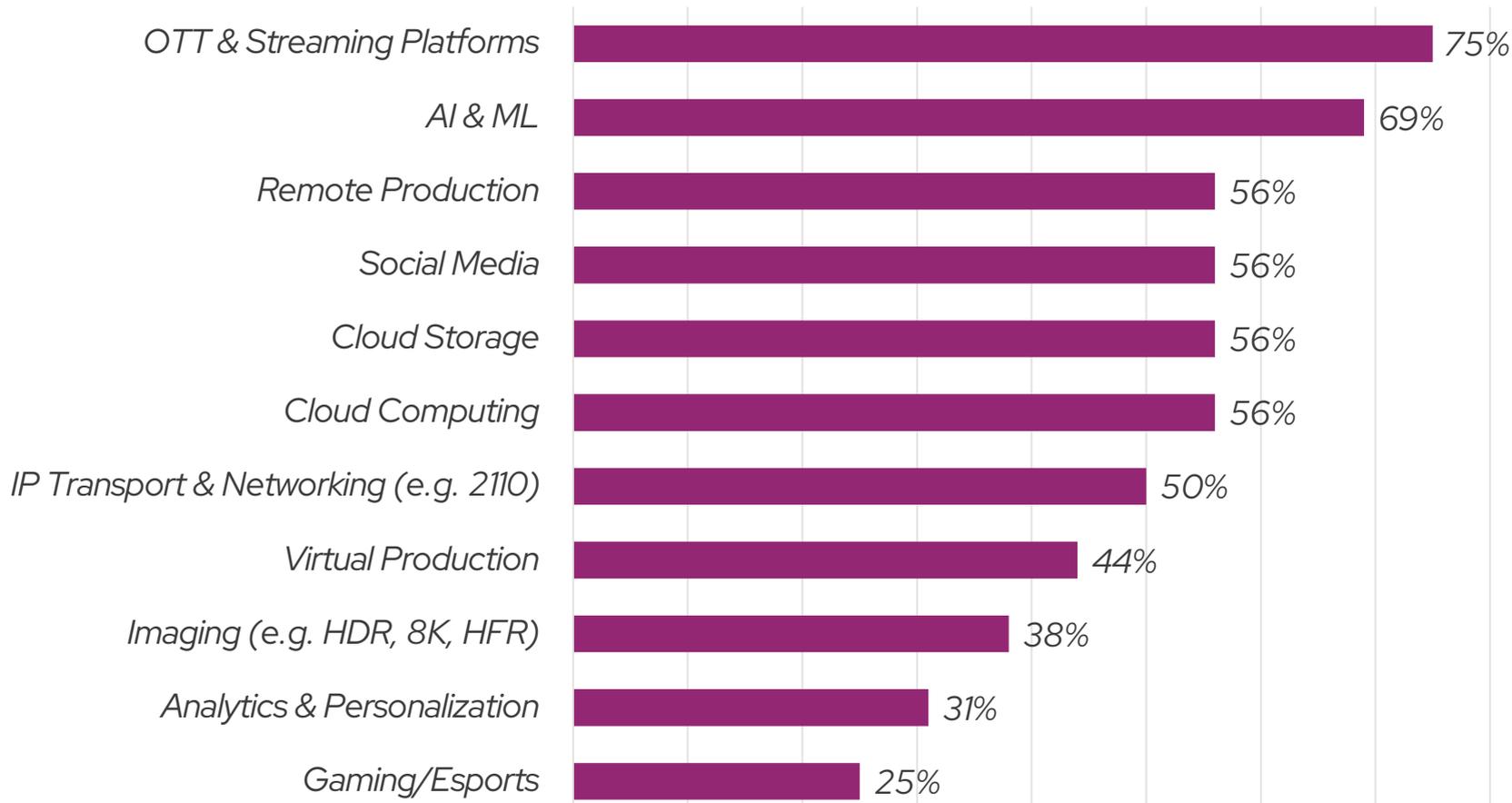
Source: IABM MediaTech Industry Tracker

MediaTech Investment

In the MENA region, OTT is leading tech roadmaps, followed by AI



Technology Roadmap: Middle East & Africa



Q. Please choose the most important trend in your organization's technology roadmap (Single response) Base: Middle East & Africa, 2025, n=16

beIN Sports on EURO 2024 coverage

Across social and digital channels, engagement reached unprecedented levels, with content generating more than 2.6 billion impressions and more than 1.5 billion video views. A total of more than 6,360 pieces of social content were posted across Facebook, Instagram, TikTok, X, YouTube, and Snapchat – all optimised for platform, language, and format.

beIN Media Group
Press Release
(September 2025)

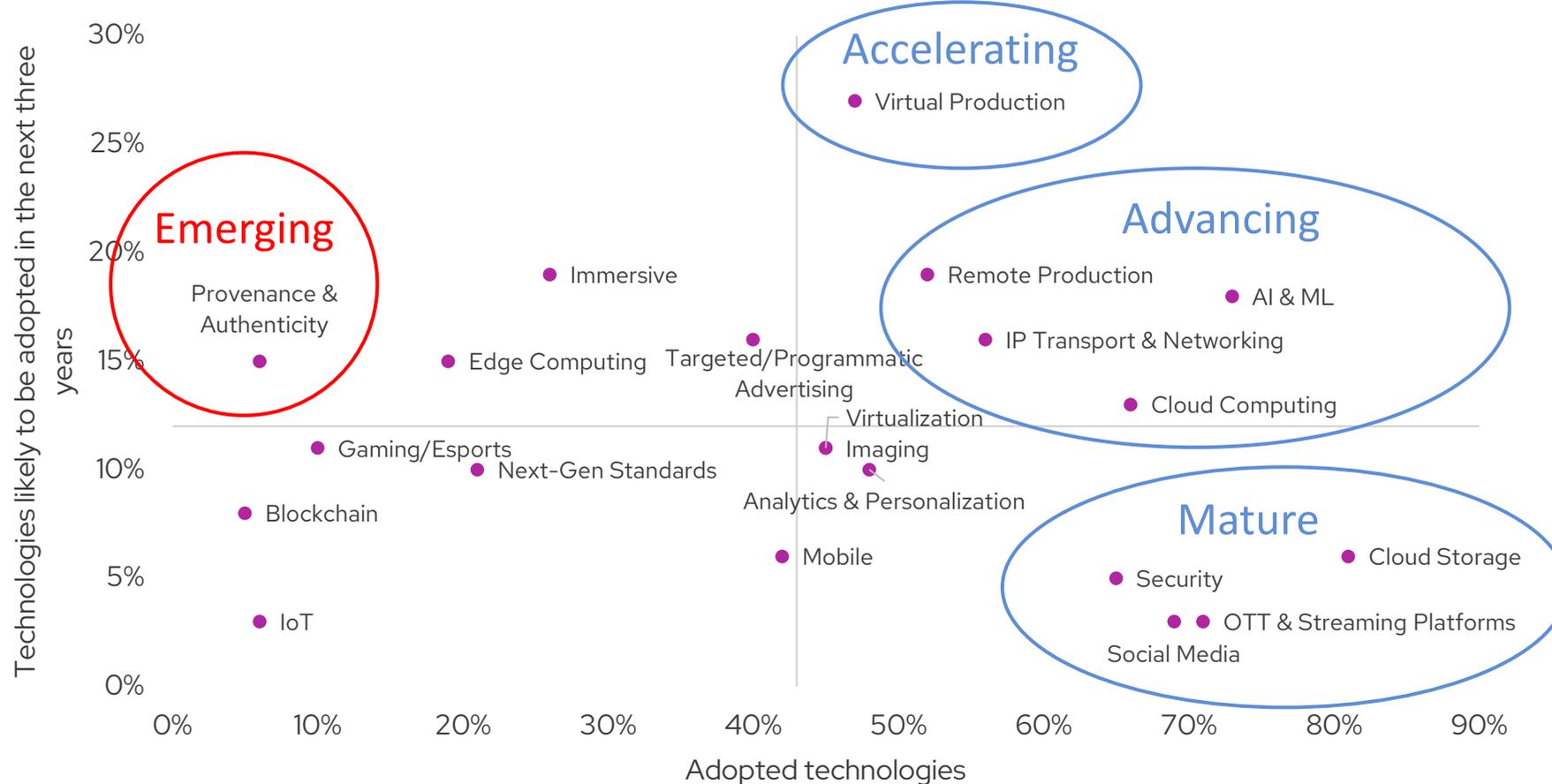
Source: IABM MediaTech Industry Tracker. Company Filings

MediaTech Investment

End users' technology adoption perspective – provenance is emerging



Technology adoption by media/production companies



Artificial Intelligence
 Artificial intelligence and IP experienced the greatest increase in Q3 2025 compared to the beginning of the year.

Provenance & Authenticity
 The emerging trend of provenance and authenticity is gaining traction during the year.

Q. Which of the following technologies has your organization already adopted? / Which of these technologies is your organization likely to adopt in the next three years? Period: 2025 Base: Media/production companies (n=62)

Source: IABM MediaTech Industry Tracker

MediaTech Investment

Flexibility, scalability and efficiency are driving the adoption of MediaTech



Drivers of technology adoption

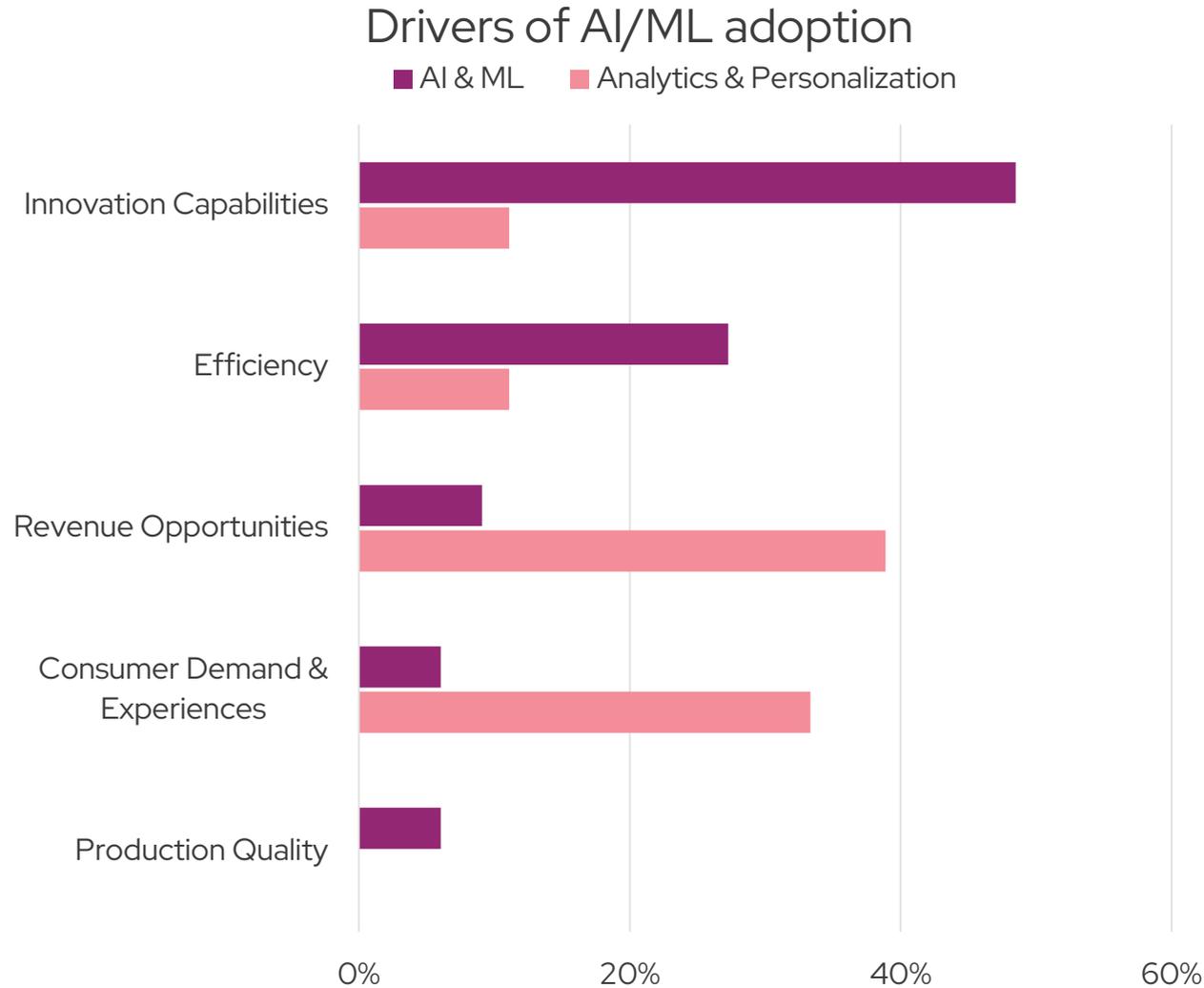
Focus Technologies in IABM TechTracker™	Trends in organizations' technology roadmaps (IABM survey)	Efficiency	Innovation Capabilities	Flexibility & Scalability	Collaborative Opportunities	Production Quality	Revenue Opportunities	Consumer Demand & Experiences
AI	AI & ML	27%	48%					
	Analytics & Personalization						39%	33%
Cloud	Cloud Computing	31%		50%				
	Cloud Storage	28%		45%				
	Virtualization			24%				
IP	IP Transport & Networking	33%		33%				
Remote Production	Remote Production	61%						
OTT	OTT & Streaming Platforms							38%

Q. Please select the most important driver of adoption for each of the following technologies. (Base: technology buyers, n= 18 to 33. Period: 2025)

Source: IABM TechTracker™, MediaTech Industry Tracker

MediaTech Investment – AI

The adoption of AI is driven by innovation capabilities and efficiency



Q. Please select the most important driver of adoption. Base: media/production companies that have already adopted or likely to adopt IP technology. Period: 2025

Source: IABM MediaTech Industry Tracker

MediaTech Vendor in an IABM Business Intelligence Interview

Moonvalley released Marey [the first commercially safe foundational AI video model for Hollywood studios] a couple of weeks ago. That's a giant leap forward for those of us in the creative space. It's giving us the toolsets that we're used to using, but they are now superpowered by AI. You're starting to get to the place where you have the best of both worlds.

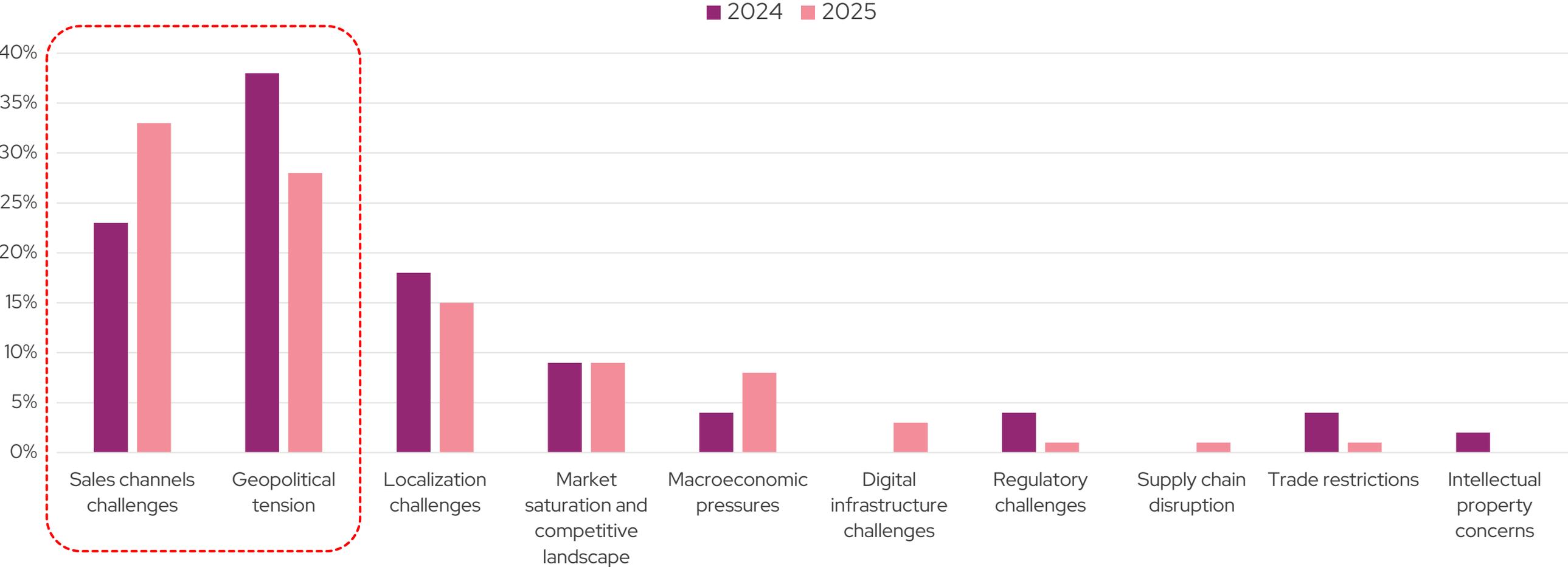
Renard Jenkins
CEO, Co-founder
I2A2 Technologies, Studios & Labs
(July 2025)

MediaTech Investment – MENA

Sales channel challenges and geopolitical tensions remain key concerns



Regional barriers to growth in the Middle East



Q. What is the major regional barrier to the growth of your business in each of the regions where your company operates? (All industry, Middle East 2024 n=56, 2025 n=75)

Source: IABM MediaTech Industry Tracker

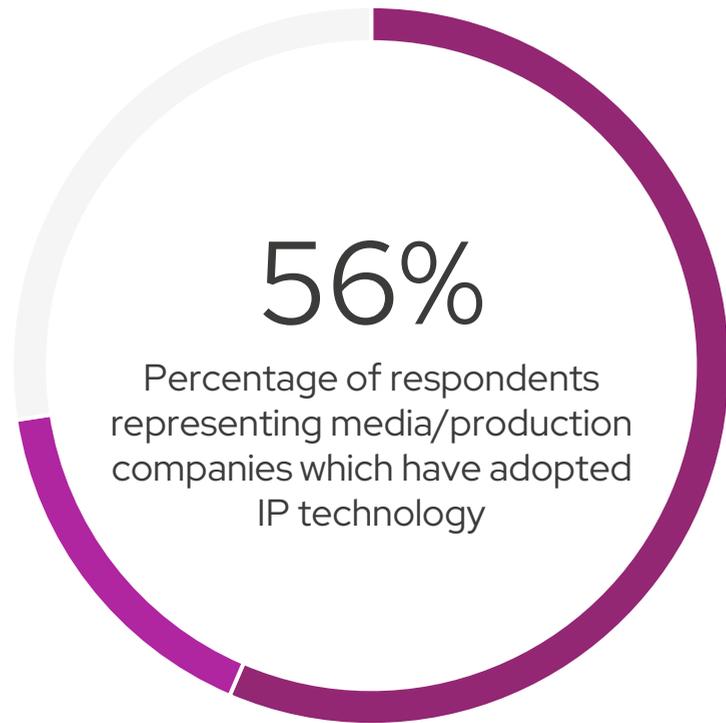
THE ADOPTION OF CLOUD AND IP

MediaTech Investment – IP

IP is an advancing technology with significant likelihood to be adopted



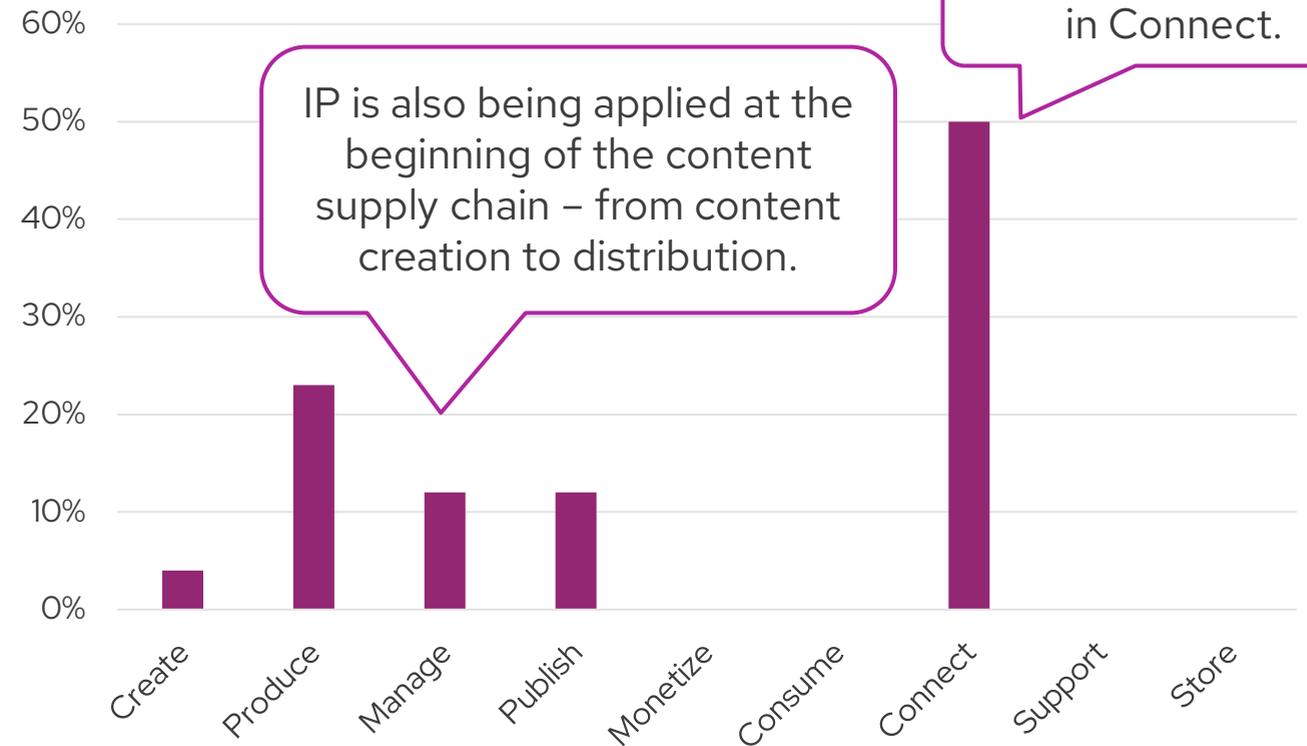
IP Transport & Networking



■ Have already adopted ■ Likely to adopt ■ Other

IP adoption across content supply chain

(primary segment)



Q: Which of the following technologies has your organization already adopted? / Which of these technologies is your organization likely to adopt in the next three years? Period: 2025 Base: Media/production companies (n=62)

Q: In which of the following content supply chain segments have you adopted/are you most likely to adopt IP? Single response. Period: 2025 Base: have already adopted or are likely to adopt IP technology (n=26)

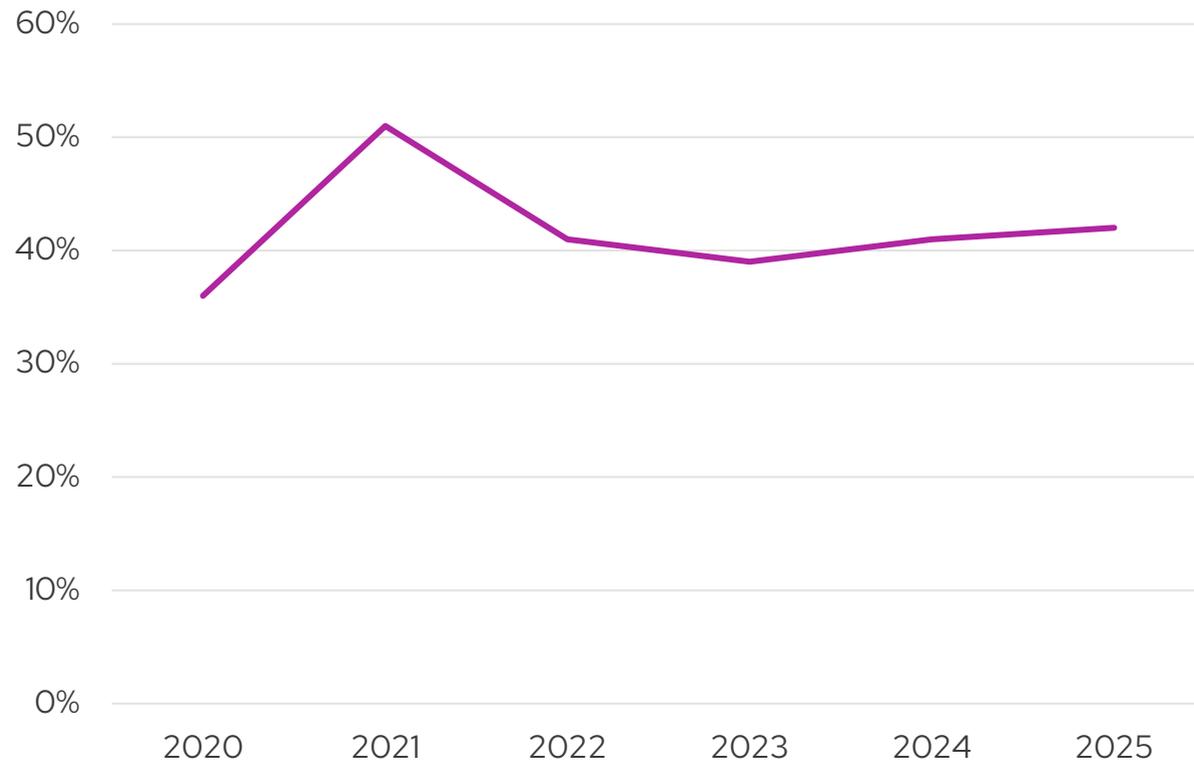
Source: IABM MediaTech Industry Tracker

MediaTech Investment – IP

IP emerges as the second priority when a single technology is prioritized

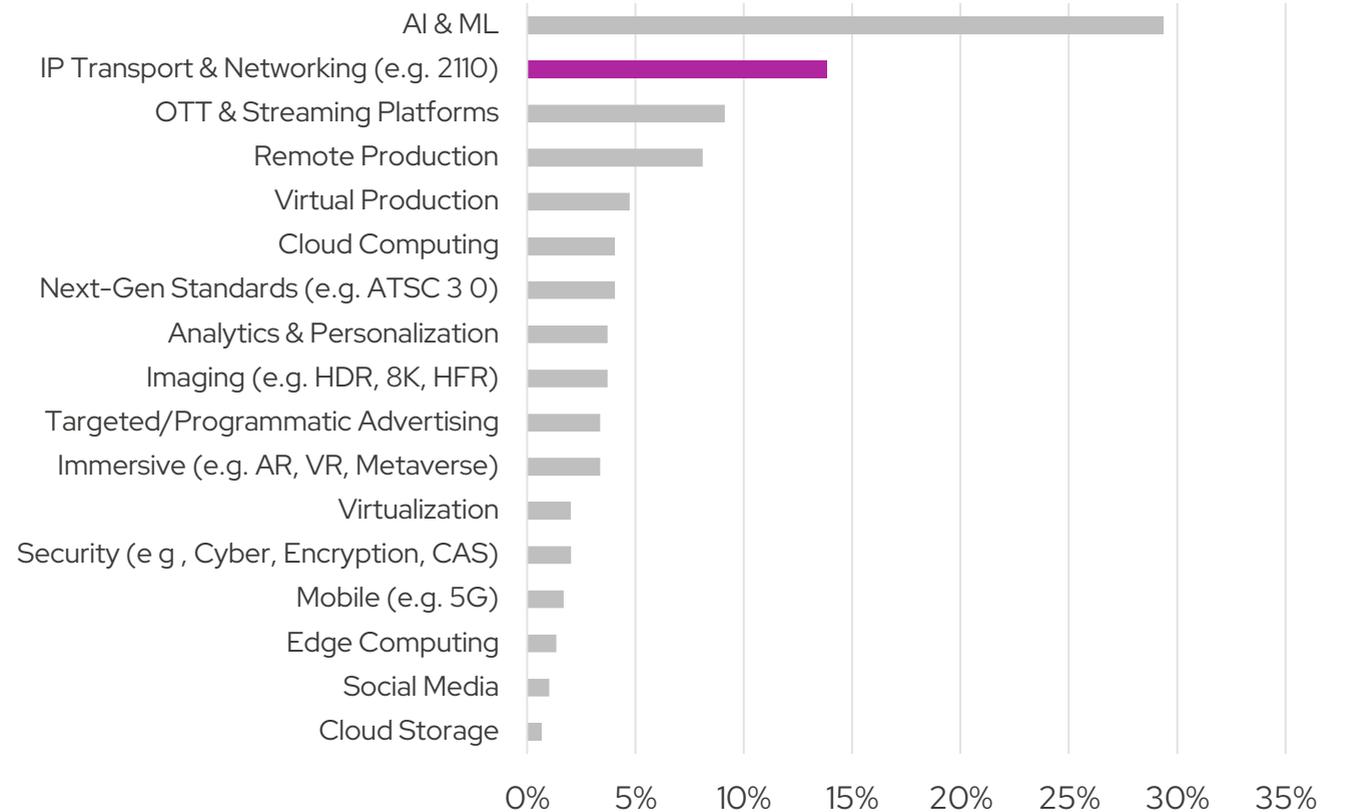


Importance of IP Transport & Networking in technology roadmaps



Q: What are the most important trends in your organization's technology roadmap? (All that apply)
Base: All industry

Most important priority in technology roadmaps

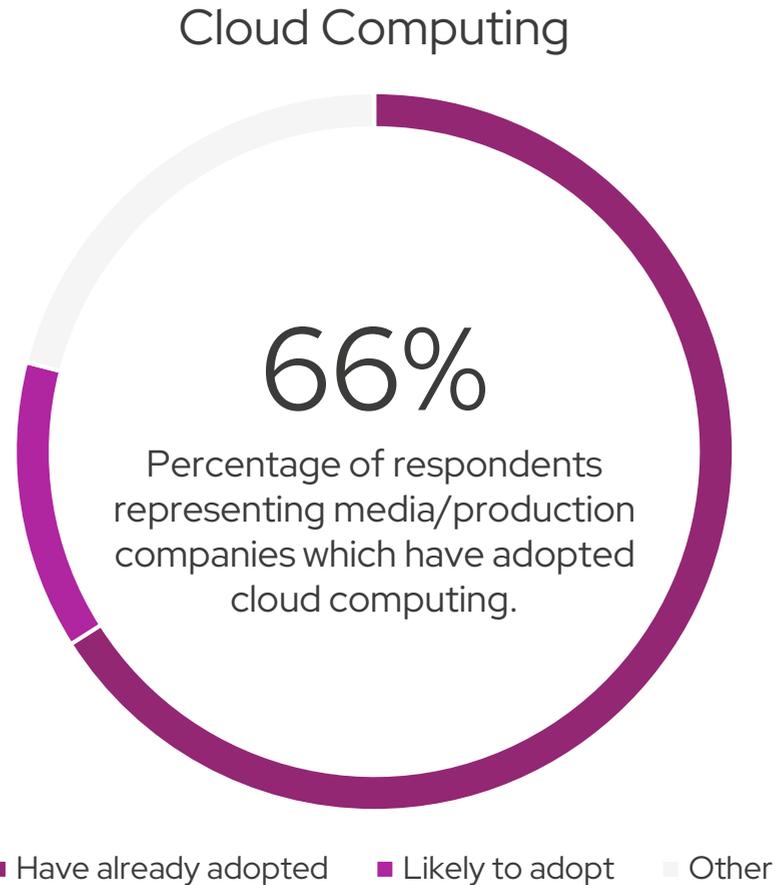


Q: Please choose the most important trend in your organization's technology roadmap? (Single response)
Base: All industry, 2025, n=296.

Source: IABM MediaTech Industry Tracker

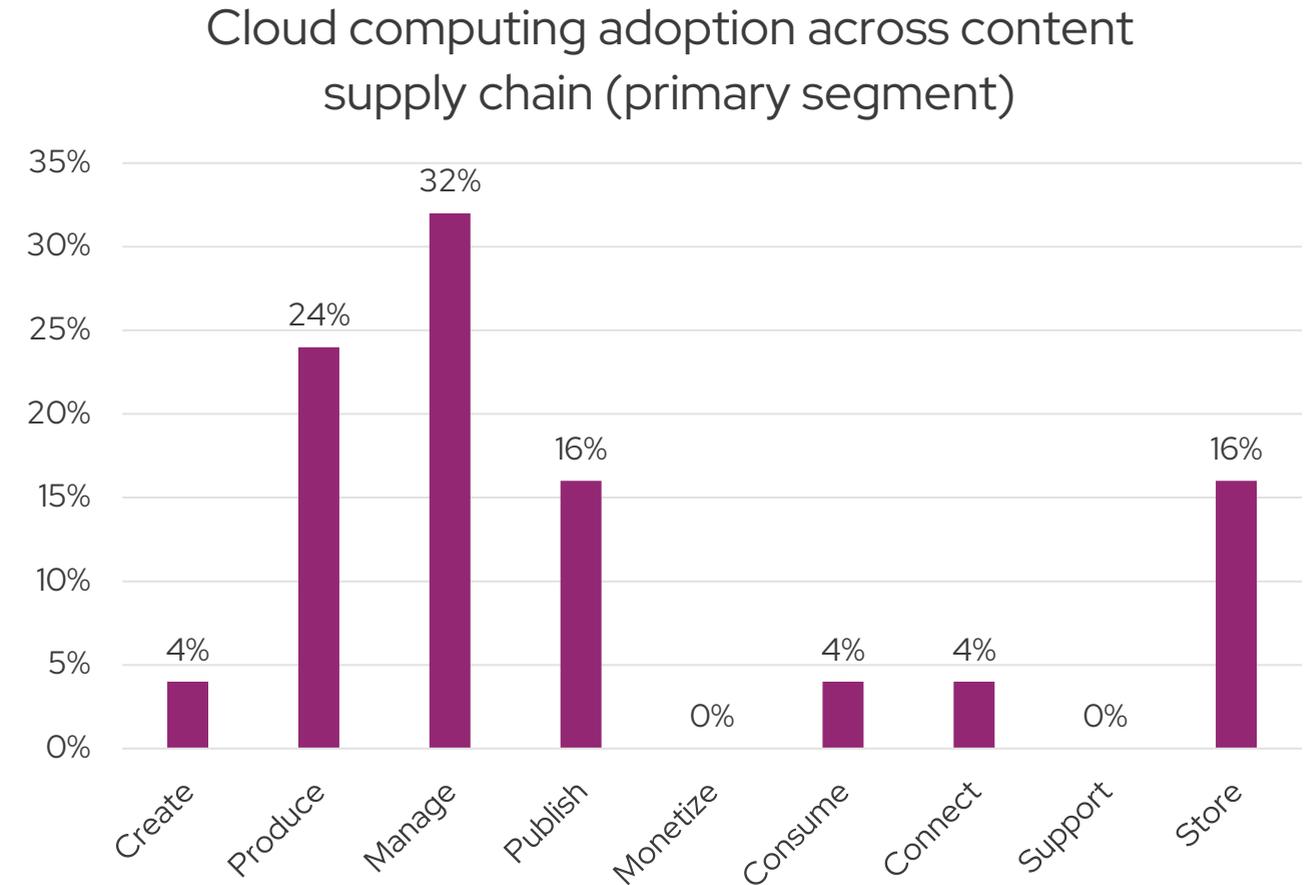
MediaTech Investment – Cloud

Cloud is mostly adopted in Produce, Manage, Publish and Store



Q: Which of the following technologies has your organization already adopted? / Which of these technologies is your organization likely to adopt in the next three years? Period: 2025 Base: Media/production companies (n=62)

Source: IABM MediaTech Industry Tracker



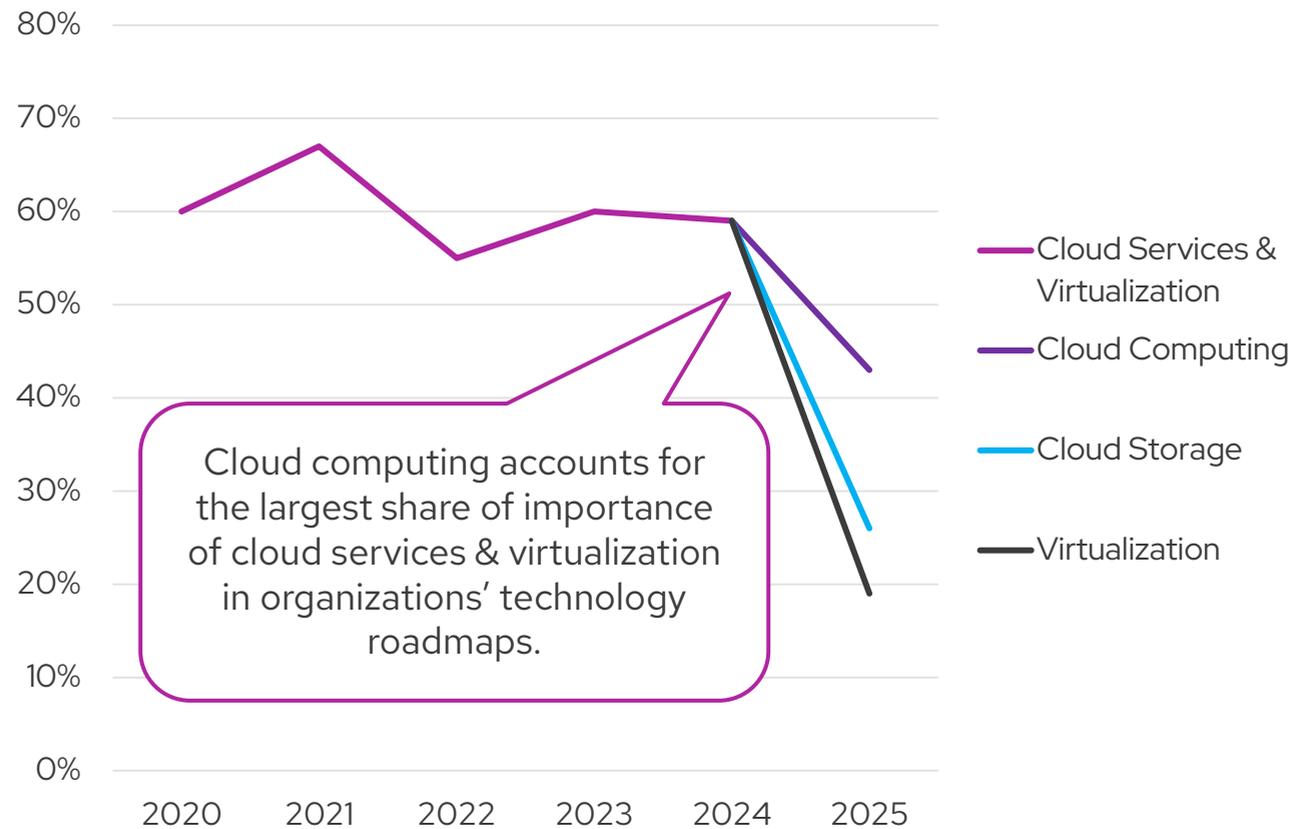
Q: In which of the following content supply chain segments have you adopted/are you most likely to adopt cloud? Single response. Period: 2025 Base: have already adopted or are likely to adopt cloud computing (n=25)

MediaTech Investment – Cloud

Cloud computing ranks above virtualization and cloud storage in importance

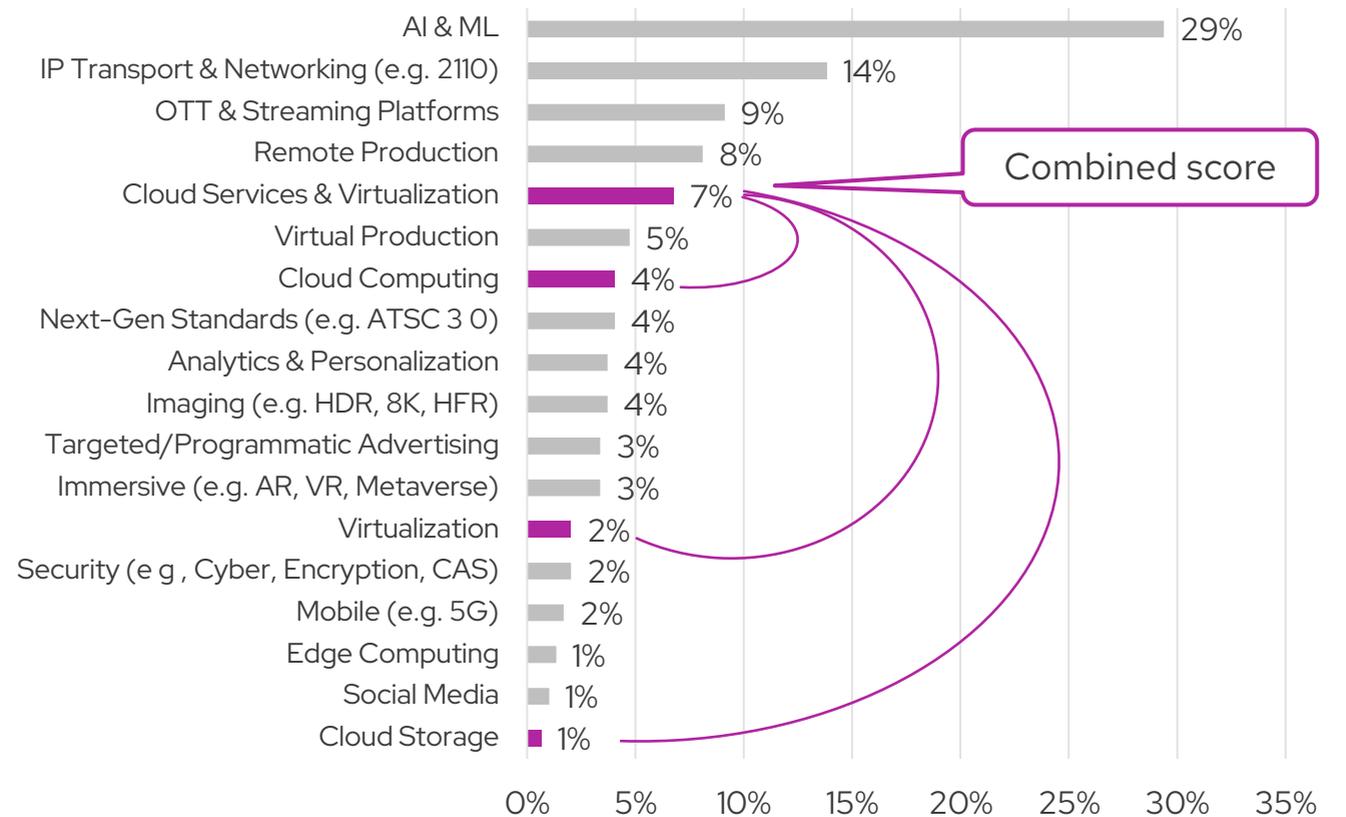


Importance of Cloud in technology roadmaps



Q. What are the most important trends in your organization's technology roadmap? (All that apply)
Base: All industry

Most important priority in technology roadmaps



Q. Please choose the most important trend in your organization's technology roadmap. (Single response)
Base: All industry, 2025, n=296.

Source: IABM MediaTech Industry Tracker

Note: In response to member feedback, IABM added segmentation of cloud services and virtualization in 2025, splitting it into three categories.

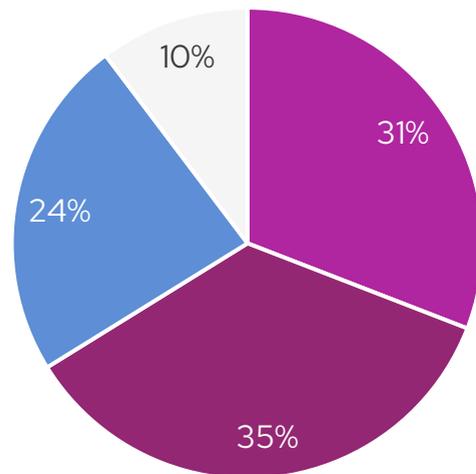
MediaTech Investment – Cloud

Usage-based pricing became dominant payment model for cloud

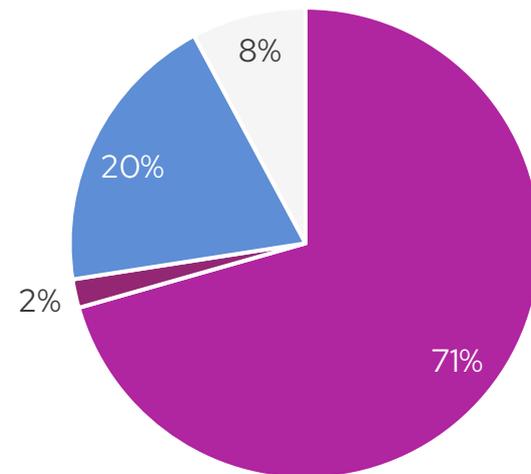
Preferred payment models

Usage-based pricing has become the dominant model for cloud services, aligning costs with actual consumption and offering flexible scaling for customers, while software procurement for on-premises or traditional applications continues to rely heavily on permanent (perpetual) licensing and, to a lesser but growing extent, subscription-based models.

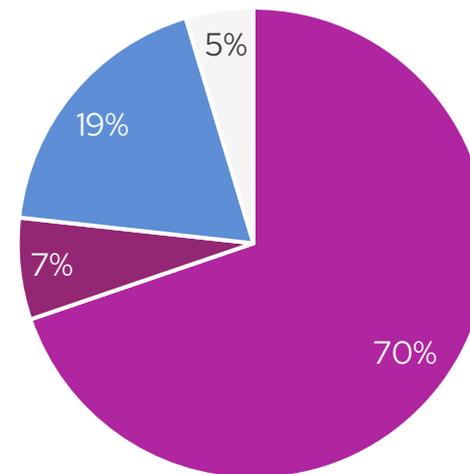
Software



Cloud Computing



Cloud Storage



- On-demand / usage-based pricing
- Permanent licences*
- Subscription
- No preference

Q: How does your organization prefer to pay for the following products/services? Period: 2025 Base: Media/production companies (Base: from 43 to 68)

*One time fee for indefinite access to software or services.

Source: IABM MediaTech Industry Tracker

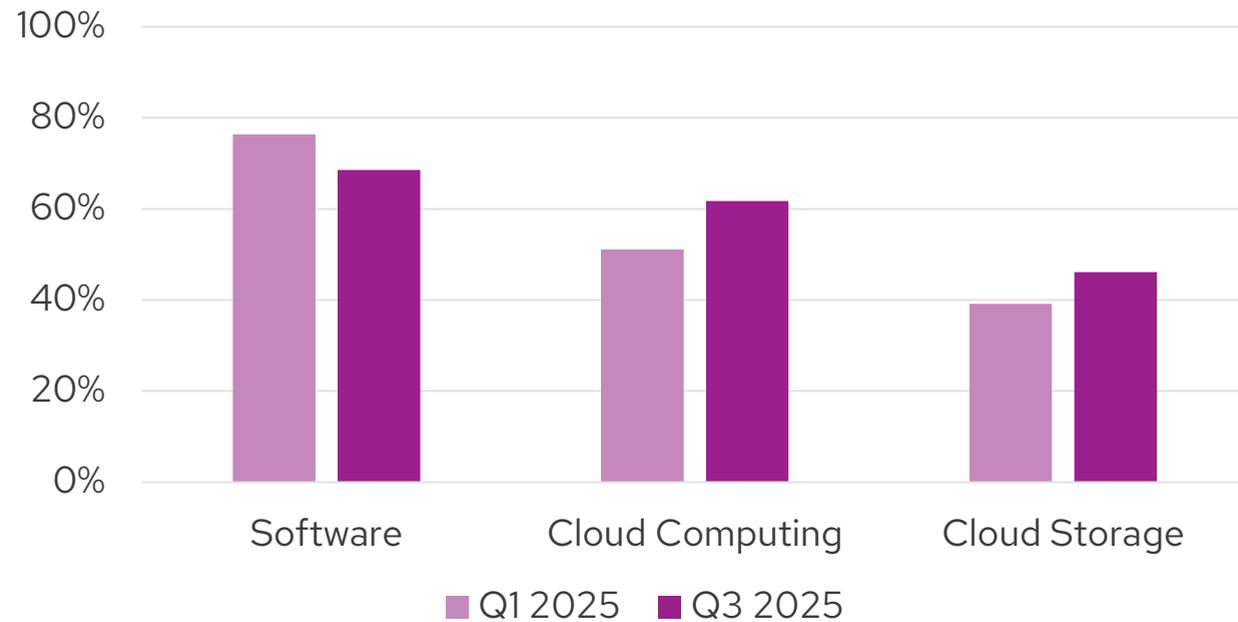
MediaTech Investment

End users' investment outlook in software has accelerated in Q3 2025



Supplier revenue outlook

NET outlook (will increase minus will decline)

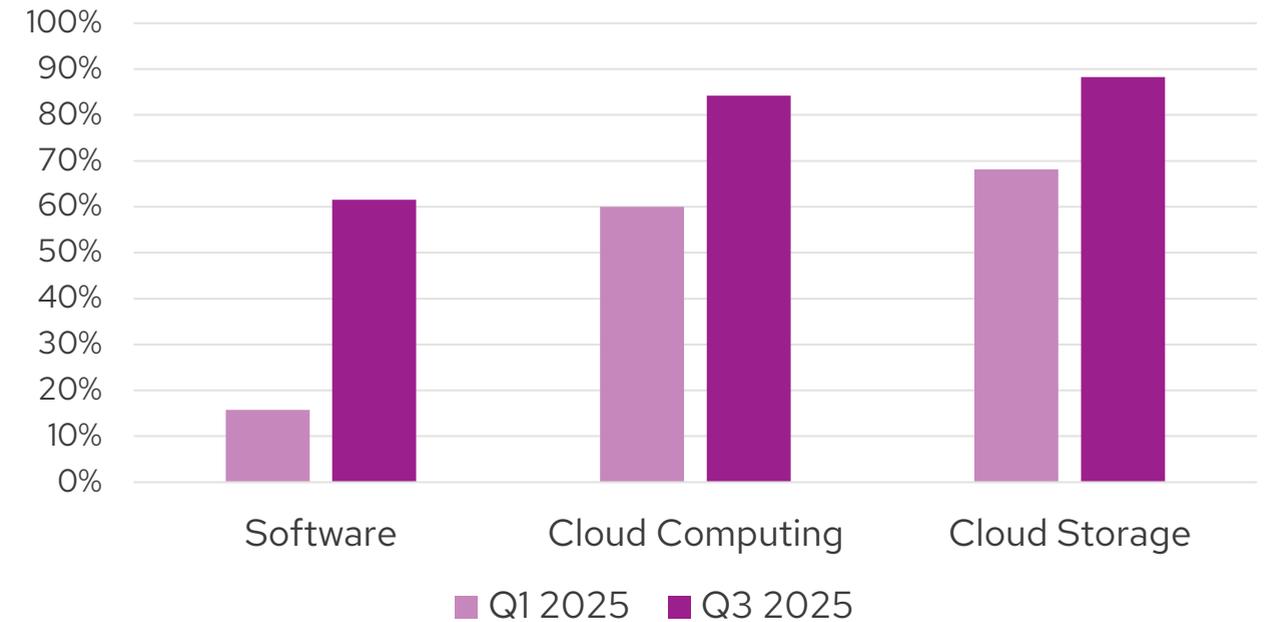


Q. What is your outlook for your organization's different types of technology revenues over the next year? (media technology vendors, sample size - from 23 to 72)



End user investment outlook

NET outlook (will increase minus will decline)



Q. What is your outlook for your organization's investment in the following categories of products/services over the next year? (media/production companies, sample size - from 17 to 38)

Source: IABM MediaTech Industry Tracker

MediaTech Investment – MENA

The adoption of Cloud and IP is picking up, making cybersecurity critical



Key drivers of Cloud and IP adoption in MENA

New entrants & upgrades

New organizations and market entrants building new facilities, greenfield projects or upgrading their existing infrastructure are increasingly adopting Cloud and IP, especially SMPTE ST 2110.

Security & backup

The OTT boom is driving demand for cybersecurity solutions, linked with the adoption of IP and Cloud. Cloud is already being used for backup, content archives, disaster recovery or as a spin-off for temporary playout channels.

Successful (sports) use cases

Successful uses cases and implementations are increasing interest in the Cloud and IP. Growth of remote production – driven by live sports – is making media businesses more open to test IP and Cloud-based solutions.

GEP Insight

MediaTech buyer in an IABM panel at IBC

Our technology stack is quite diverse. We run multi-cloud and hybrid environment. [...] MBC is a publicly listed company, so cybersecurity is a cornerstone for us. We have a very robust third-party supply chain for security. In terms of security, our biggest challenge is to find cyber talents that understand the media ecosystem. [...] AI does help. The fact that we can deploy a Large Language Model to scan billion of events and have that intelligence in real-time is optimizing our workflow.

Aus Alzubaidi
Chief Information Security Officer
MBC Group
(September 2025)

MediaTech Investment – MENA

OpEx model and connectivity issues pose a challenge for Cloud adoption



MediaTech supplier in an IABM interview

MediaTech supplier in a BroadcastPro ME interview

The financial model of the cloud is a big challenge. There is this OpEx investment limitation, because government-funded organizations – so all major media companies – cannot push back due to government budgeting structures which are based on year-by-year funding allocations, rather than long-term or multi-year budgeting.

*Cloud may be ideal for one customer, while another may benefit more from an on-premises deployment. For example, we spoke with a few customers in **Saudi Arabia** who feel that **connectivity charges** are still too high, making cloud less viable for them at the moment. In other parts of the Gulf region, however, customers may see the benefits of cloud and are ready to adopt it.*

Hasan R. Sayed Hasan
Managing Director
Master Media
(February 2025)

Mark Gardner
VP of Sales, EMEA
Grass Valley
(June 2025)

Source: IABM, broadcastprome.com

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PURCHASING FACTORS

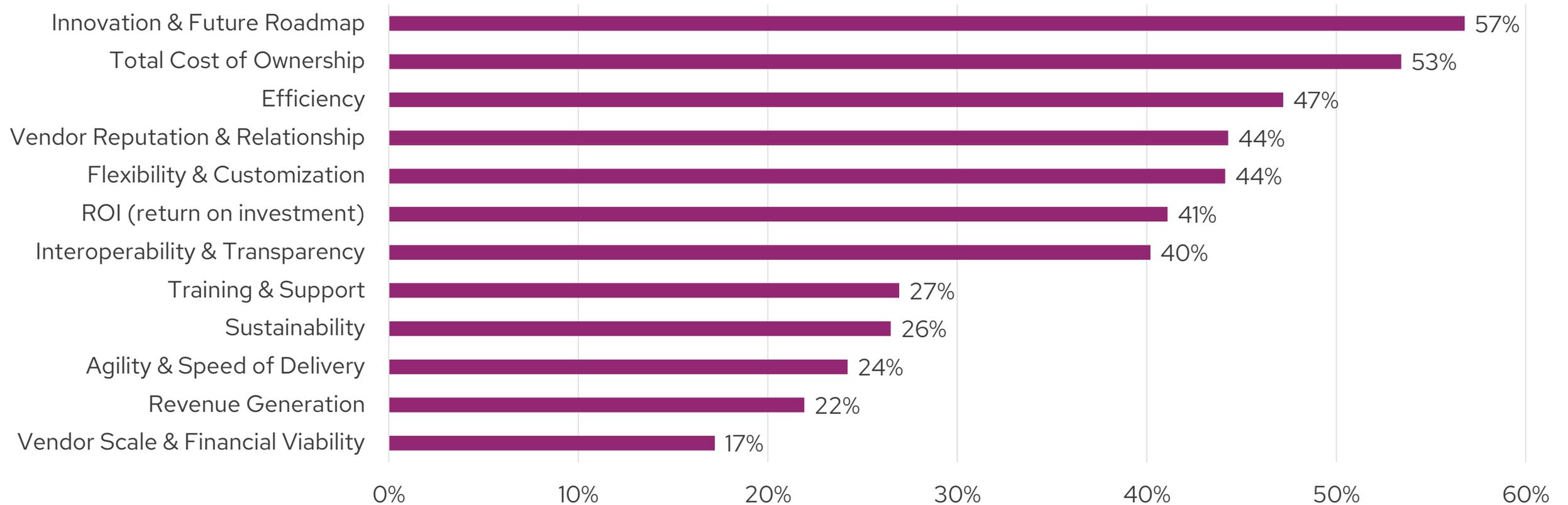
November 2025

MediaTech Investment

Innovation, total cost of ownership and efficiency keep driving investment decisions



Technology Purchasing Factors



Q. In general, besides cost and technical specification, what are the most important factors that influence your decision to purchase media technology products and services? (media technology buyers, 2025 n=88)

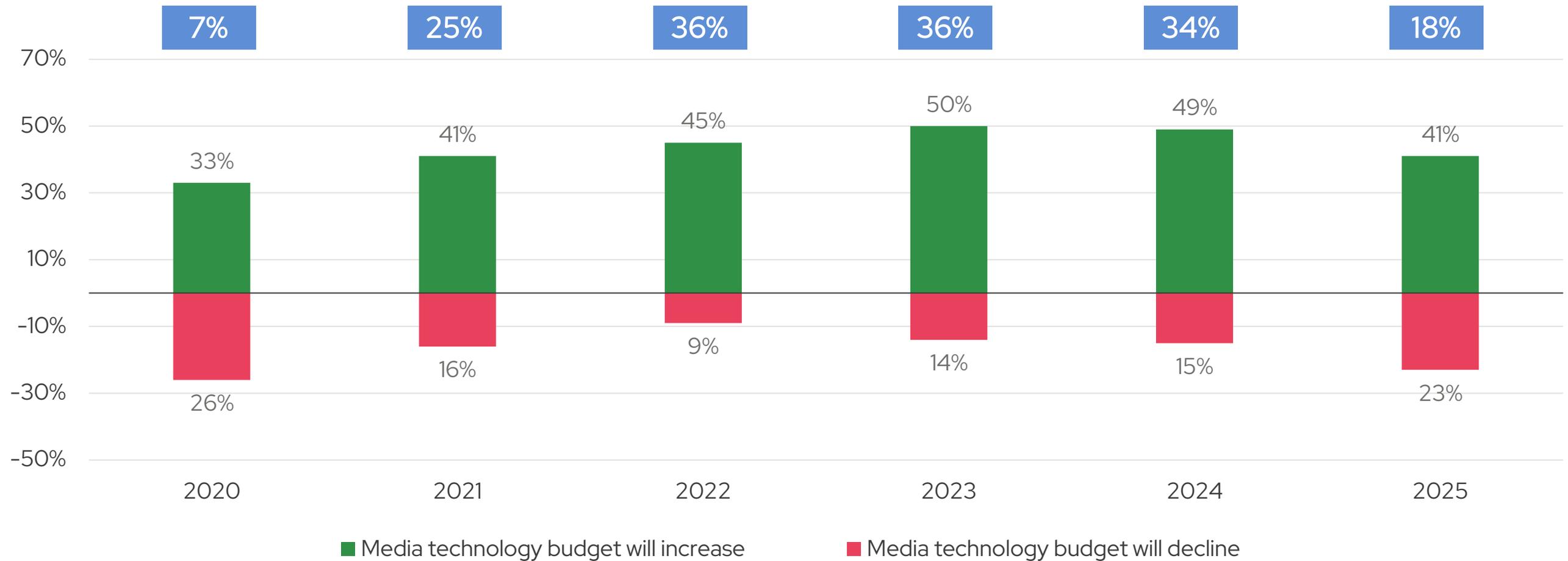
Source: IABM MediaTech Industry Tracker

MediaTech Investment

Investment is expected to be more conservative in the year ahead



MediaTech NET investment outlook



Q. What do you predict will happen to your organization's media technology budget over the next year? (Media technology buyers)

Source: IABM MediaTech Industry Tracker

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KEY TAKEAWAYS

November 2025

Core Driver: Digital Transformation



- **Live Streaming & Multiple Platforms:** Audiences are shifting from linear viewing to live streaming on multiple platforms watching several simultaneous streams. Younger audiences want to interact and engage with the content in various ways, driving invest in live content and experiences, which are increasingly watched – and created – on smartphones.
- **Software-Defined Workflows:** The industry is moving to software-defined workflows, adopting IP and cloud technologies, providing essential flexibility, scalability and efficiency. The hybrid cloud having become reality, media businesses are learning to use cloud more selectively to control costs.
- **Generative AI:** The rapid evolution of Generative AI and Agentic AI are providing unprecedented efficiency and innovation capabilities for media businesses especially in Produce, Manage and Store. This is raising concerns related to data provenance and authenticity, which the industry needs to address together, in collaboration.

MENA AS THE NEW HUB FOR AI



Market Dynamics: MENA – especially the Gulf countries – are diversifying their economies and investing in digital future at all levels and sectors of the society

FDI in AI: Thanks to the favorable government policies, the Gulf region is attracting a significant amount of foreign direct investment in data centers, AI and related infrastructure by the world's leading big tech firms. This is ramping up the Gulf countries' technological capabilities fast with positive spillover effects to various sectors.

OTT and Streaming Dominance: The shift to OTT platforms continues to accelerate, driven by media businesses' investment in live sports and local content, which is accessible in various formats and platforms.

IN CONCLUSION:



The future of MediaTech is being shaped by speed, convergence, agility and transformation.

Success will depend on the industry's ability to agilely adopt AI, IP and cloud technologies to personalize content, optimize business models, and deliver engaging, high-quality experiences to a rapidly evolving global consumer base.

Innovation and cross-platform synergy are no longer options, they are the new mandates.

The MENA region's digital momentum with rapidly developing cloud computing and AI infrastructure provides numerous opportunities to MediaTech vendors in all parts of the media supply chain.

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