مجلس دبي للإعلام

DUBAI MEDIA COUNCIL

# The Future of Streaming in Dubai

Roundtable Insights and Strategic Roadmap

> Our journey is about more than technology—it's about people. By empowering Dubai's storytellers, nurturing fresh ideas, and forging meaningful collaborations, we'll create a streaming experience that resonates deeply with every viewer and unites communities across the region.

— Her Excellency Nehal Badri, Secretary General, Dubai Media Council

# Introduction and Vision

Dubai offers a strong foundation to lead the region's streaming and media landscape –from advanced digital infrastructure and a diverse, tech-savvy population to a government that actively supports innovation. With the MENA streaming market projected to reach $1.5 billion in revenue in 2025, the Dubai Media Council brought together key players from across the industry – regulators, platform leaders, producers, and investors – for a roundtable session to assess the current landscape and identify what is needed to chart a visionary path forward. This white paper captures the insights shared during that session and benchmarks them against global and regional platforms such as Netflix, Shahid, Watch It, Disney+, and OSN. This report aims to guide investment and policymaking that will help position Dubai as a creative and competitive force in the digital media era.

In the pages to follow, we explore how Dubai can harness its advantages, from ultra-fast connectivity to cultural diversity, while addressing gaps such as high production costs and content piracy. We delve into content creation opportunities, drawing lessons from Netflix's global success with Arabic originals and Shahid's dominance in MENA streaming. We examine different monetization models and the evolution of regulations to protect intellectual property. We also outline the development of a holistic ecosystem: nurturing talent pipelines, exporting content, fostering co-productions, and integrating cutting-edge emerging technologies. Finally, we consider strategies for audience engagement and marketing in a city where over 200 nationalities converge, and articulate Dubai's potential to emerge as both a regional and global creative hub for streaming.

This paper outlines actionable recommendations to support government stakeholders, media platforms, and investors in driving the next phase of growth for Dubai's media sector.

# Roundtable Overview

The “Future of Streaming in Dubai” roundtable was held in July 2025, hosted by the Dubai Media Council. It hosted senior stakeholders from government, telecom and media regulators, global streaming platforms, regional OTT services, production studios, and investors.

*Methodology*

The session structured around four key thematic pillars: Content Creation & Development, Marketing & Audience Reach, Monetization & Business Development, and Industry Enablers & Ecosystem, ensuring a holistic examination of Dubai’s streaming industry. The session was facilitated using a design-thinking framework and followed a structured, participatory process designed to generate actionable insights through collaborative problem-solving. Participants were guided through the following steps:

1. Mapping Strengths

Participants begin by outlining the current strengths of the streaming industry in Dubai, including infrastructure, talent, regulatory environment, and market dynamics.

2. Identifying Challenges

Key gaps and barriers are then identified, from high production costs to fragmented talent pipelines and limited production incentives.

3. Prioritizing Challenges

From the full list, participants prioritize the most pressing challenges and framed “How Might We” questions to guide solution-oriented thinking.

4. Brainstorming Solutions

For each priority challenge, participants propose actionable solutions drawing from regional benchmarks, global best practices, and local insights.

5. Assigning Responsibility

Solutions are then mapped to relevant entities (e.g. government bodies, private sector platforms, or joint initiatives) based on who would be best positioned to lead or support implementation.

6. Impact vs. Effort Mapping

Finally, all proposed solutions are plotted on an Impact vs. Effort Matrix, helping to visualize which actions could deliver the greatest value relative to the effort required, thus guiding short-term versus long-term prioritization.

# Dubai's Strengths in Streaming and Media Production

Dubai today offers a prime environment for streaming platforms and content creators. Participants in the roundtable unanimously praised the city's world-class infrastructure and enabling environment for media business. Several key strengths set Dubai apart:

- **State-of-the-Art Digital Infrastructure:** The UAE boasts some of the highest internet and mobile connectivity rates worldwide. In 2024 it ranked second globally for mobile internet speed with average downloads over 300 Mbps, an essential enabler of seamless HD and 4K streaming on the go. Nearly 100% urban broadband coverage, robust fiber-optic networks, and nationwide 5G rollout ensure that both users and platforms can operate without bandwidth constraints. This world-class connectivity allows Dubai to support data-heavy innovations like cloud streaming and interactive content.

- **Tech-Adaptive Ecosystem:** Locally-based OTT platforms have eagerly embraced modern tech stacks. Major services such as Shahid, StarzPlay, and OSN+ have migrated core infrastructure to cloud providers like AWS and Azure, allowing instant scalability, lower costs, and personalized content delivery at scale. This cloud-native approach, paired with advanced AI integration, highlights the sophistication and agility of Dubai's digital media infrastructure. Dubai's platforms routinely leverage real-time analytics, A/B testing, and automated transcoding to optimize user experience across devices – critical in a region where ~63% of viewers stream on mobile devices.

- **Cultural and Demographic Diversity:** Dubai is home to over 200 nationalities and a predominantly young population. This diversity gives Dubai a natural edge for multilingual storytelling and global narratives. Content produced here can easily incorporate Arabic, English, Hindi, Tagalog, Urdu, and more, tapping into a broad spectrum of viewers. A youthful, tech-savvy demographic means audiences are quick to adopt new formats and technologies. Over 55% of MENA's population are under 30, making digital streaming their medium of choice. Dubai's mix of cultures effectively serves as a living focus group for what might appeal to global audiences – a point noted by the session's participants who called Dubai "a great experimental market" to test content and models due to its diversity.

- **Business-Friendly Environment:** The emirate's ease of doing business and pro-investment climate in media are major draws. There are no demanding taxes on media companies (Dubai imposes a 0% corporate tax in free zones and has no income tax), and processes for licensing are streamlined. Government regulators are seen as responsive and open to industry feedback. This environment has attracted regional headquarters of global media players like OSN+ to base themselves in Dubai. It's also spawning a growing network of startups and enablers in digital media, creating a dynamic creative ecosystem.

- **Talent and Lifestyle Magnet:** Dubai's cosmopolitan lifestyle and opportunity-rich economy draw talent from across the Middle East and beyond. The city hosts a thriving pool of media talent, from filmmakers and animators to tech developers, combining local creatives and international experts. Participants noted that people not only come to work in Dubai, they want to live here, given the high quality of life, safety, and amenities. This helps in retaining skilled professionals. Moreover, new initiatives like long-term "Golden Visas" for creators are helping to attract global creative talent, reinforcing Dubai's ambition to be a cultural as well as technological leader.

- **Government Support and Vision:** The leadership's commitment to making Dubai a media and innovation hub is evident. Authorities have launched strategies like the Dubai Media Strategy (aiming to double the media GDP contribution to 3% by 2033) and the Dubai Media Council's initiatives to grow the media sector. Designated Freezones such as Dubai Media City offer incentives, infrastructure, and one-stop services to media companies. The government also continuously updates policies to encourage investment, e.g. allowing 100% foreign ownership in media ventures. Roundtable members lauded the responsive government that is quick to evolve policies in support of the creative sector. All these strengths provide Dubai with a solid foundation to build a world-leading streaming industry.

# Table 1 Content Creation & Development

## Challenges & Opportunities:

Dubai's creative scene is brimming with potential, but stakeholders identified hurdles in developing original streaming content. Historically, a lack of structured incentives (such as rebates or grants) has made it difficult to attract large-scale productions to Dubai or to finance ambitious local projects. This gap has contributed to talented storytellers operating on limited budgets, sometimes resulting in repetitive or safe content that does not fully capture the UAE's unique stories. Moreover, without enough high-profile UAE productions, global visibility of Dubai-made content remains limited. Yet, the opportunity is enormous: streaming platforms have opened the door for local creators to directly reach audiences, bypassing traditional gatekeepers. The appetite for authentic, Arabic content is surging, both regionally and internationally, as evidenced by recent hits. For example, Netflix's reality series Dubai Bling became a global sensation across 51 countries, with its latest season logging 18.6 million hours viewed in its first week. Likewise, Arabic originals like Honeymoonish (Kuwait) and AlRawabi School for Girls (Jordan) trended in dozens of countries on Netflix, proving that local stories can achieve global reach.

Regional players are also investing heavily in originals; Shahid (MBC Group's streamer with 27 million MAUs) is now the dominant Arabic-language platform thanks to its growing slate of Gulf dramas and Egyptian series. As Warner Bros. Discovery's GM noted, "the appetite for high-quality, locally produced content – rich in authenticity and deeply rooted in the region's heritage – is stronger than ever". In short, Dubai has the ingredients (talent, stories, infrastructure) to produce world-class streaming content; the task is to activate these with targeted support and partnerships.

## How Might We (HMW) Questions – Content Creation & Development:

*During the roundtable, participants posed several key questions to spark solutions:*

- **HMW attract more local and international productions** to Dubai by designing meaningful financial incentives?
- **HMW encourage more authentic local stories** on streaming platforms through targeted grants, affordable studio access, and public-private co-productions?
- **HMW nurture emerging creative talent** in writing, directing, and producing so that fresh voices and diverse narratives reach the screen?

## Strategic Actions & Policy Recommendations:

- **Establish a Dubai Streaming Content Incentive Program:** Much like leading film hubs, Dubai should introduce production incentives to attract content creators. The roundtable urged implementing a rebate or tax credit scheme (e.g. 30–40% rebate on qualified spend) to immediately boost local and international production in Dubai. A competitive rebate, coupled with streamlined one-stop permitting, would make Dubai a filming destination of choice.
    - *Example Benchmark*: Abu Dhabi's 30% rebate has already drawn major productions, and countries from Canada to South Korea use incentives to stimulate content creation. Dubai can tailor a program to streaming (e.g. rebates for series or digital-first content) and include bonuses for employing local cast and crew, mirroring global best practices.

**Immediate step:** commission an economic impact study (as Abu Dhabi did, finding AED4.5 GDP return per 1 AED rebate) to justify the model.

- **Launch a Public-Private Content Fund:** To support homegrown projects, a dedicated "Dubai Streaming Content Fund" should be created, seeded by government and matched by private investors and platforms. The fund can offer grants or co-production financing for Emirati and UAE-based original shows (web series, films, docu-series) each year. For example, committing to finance 5–10 local streaming productions annually would energize the sector. Participants emphasized focusing funding on "originality and cultural relevance" to ensure the stories reflect UAE's diverse society. Such a fund would mitigate financial risk for creators, enabling more ambitious and authentic storytelling.
    - *Example benchmark*: Netflix's "Because She Created" initiative provides grants and training for female Arab filmmakers, reflecting how investment in creators can yield globally acclaimed content. Dubai's fund could similarly mandate mentorship or incubation as part of grants to build capacity.

- **Forge Partnerships with Global Platforms:** Dubai should leverage its appeal to collaborate with major OTT players on local content.

  - *Example benchmark*: Netflix's investment in Arabic originals has been a game-changer. The first Arabic Netflix film Perfect Strangers (2022) and series like Love is Blind: Brazil – Habibi adaptation, put regional talent on a worldwide stage. Likewise, Warner Bros. Discovery recently invested in OSN's streaming arm to bolster Arabic content output, showing that global studios see value in partnering with regional platforms. By positioning Dubai as a willing co-production hub (potentially via a one-stop "Dubai Media Authority"), Dubai can attract such collaborations. The government can facilitate with matchmaking events or a "Streaming Content Market" at festivals where creators pitch concepts to platform execs (akin to film markets).

  - *Proposed idea*: form a "Dubai Originals" partnership program inviting streamers like Netflix, Amazon, Disney+, Shahid, etc. to co-produce UAE-based content. This could involve co-investment or providing production support in exchange for distribution rights. The roundtable noted that direct negotiations with Netflix, Amazon, Disney+, Shahid have high payoff – these platforms gain fresh local content while Dubai's creators gain global exposure.

- **Invest in Talent Development & Writers' Rooms:** Content quality depends on skilled talent. The roundtable urged programs for talent development and on-set experience. For example, government-backed subsidies for young creatives to take on apprenticeships in productions. Dubai could expand initiatives like the Dubai Film and TV Commission's training workshops or partner with local universities and international film schools to create specialized courses in digital content creation.

  - *Proposed idea:* set up a Dubai Writers' Lab in partnership with streamers to incubate new scripted series ideas, particularly those that can travel globally. Youth-focused programs like media bootcamps or summer labs can also add fresh voices into the industry. These efforts will address the current "gaps in academic and industry linkages" noted by participants, ensuring a pipeline of skilled writers, directors, showrunners, and producers for the streaming era.

All these measures aim to transform Dubai into a thriving media creation hub. By lowering financial barriers, actively developing talent, and partnering with global leaders, Dubai can unlock a wave of original content. With the above steps, Dubai can deliver such content at scale – not only satisfying local demand but exporting Emirati stories to the world, aligning with the vision of making Dubai a regional content capital.

# Effort vs Impact Matrix:

HIGH IMPACT

## Quick Wins

A. Relax content restrictions in coordination with the UAE Media Council

B. Explore dubbing content into other languages (potentially using AI) (DMI)

C. Linking incentives given to streaming platforms w/ prioritizing content from DMC

F. Content Creation Competition

## Major Projects

D. Focus on breaking stereotypes through storytelling:

- Female-led narratives
- Adapting published Emirati books
- Retelling global stories through an Arab lens

H. Support and nurture local streaming platforms

E. Establish community cinemas for underrepresented groups (in partnership with the private sector, e.g., VOX, Satwa initiatives)

HIGH EFFORT — LOW EFFORT

## Fill-ins

I. Bringing back local ads from the from the 1990s and 2000s

## Thankless Tasks

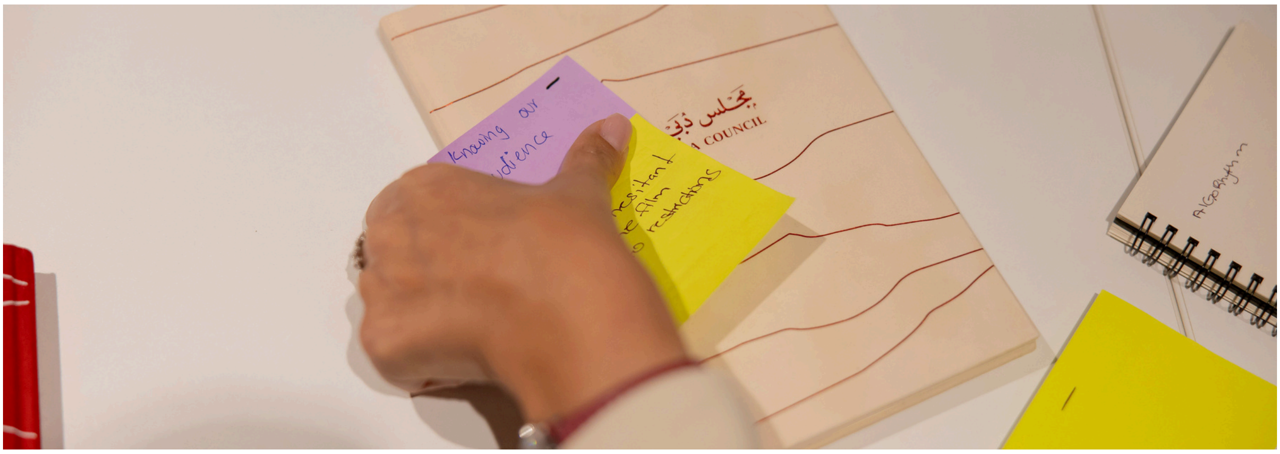
G. Centralize all media content guidelines at the federal level

LOW IMPACT

# Table 2 Marketing & Audience Reach

## Challenges & Opportunities:

In today's attention economy, even the best content needs strong marketing and distribution strategies to reach its audience. Dubai-based streamers and content creators face the challenge of breaking through crowded competition to connect with viewers both locally (UAE's multilingual population) and across MENA. Traditional marketing channels are fragmented, and competition is intense – not only from global services but also from user-generated content on platforms like YouTube and TikTok.



However, Dubai's digital environment offers unique advantages for audience reach. The UAE boasts one of the highest social media penetration rates globally (115% as of 2024) and was the world's #1 country for YouTube usage with 94% of the population active on YouTube. This means promotional content, trailers, and influencer buzz can spread rapidly. Moreover, the UAE's population is extremely connected via mobile: smartphone penetration is near universal, and the UAE ranks 2nd worldwide in mobile internet speed (300+ Mbps) – a critical enabler for mobile video consumption.

With Gen Z and Millennials driving consumption, short-form videos and personalized recommendations have become key tools. Warner Bros. Discovery's research confirms that young MENA audiences engage most with content that "mirrors their cultural identities and lived realities", delivered in an emotionally authentic way. This implies that localized marketing – in language, culture, and values – yields much stronger results than generic campaigns.

Another opportunity is leveraging Dubai's status as a global city: content from Dubai has cosmopolitan appeal and can be marketed to expatriate communities and international audiences as "Dubai originals," piggybacking on the city's brand. The roundtable noted that Dubai's image of innovation and luxury could be harnessed in promoting streaming content (for example, using Dubai's iconic locations and events as backdrops for marketing stunts or tie-ins). Finally, participants highlighted the need for better data-driven marketing. Many local producers lack insights into audience behavior, making it harder to target promotions effectively. By embracing analytics and personalization algorithms, Dubai's streaming sector can significantly enhance audience acquisition and retention.

## How Might We (HMW) Questions – Marketing & Reach:

- **HMW leverage Dubai's global city brand** and diverse population to amplify the reach of locally-produced streaming content across the MENA region and beyond?

- **HMW engage Gen Z and millennial viewers** on the platforms they frequent (TikTok, YouTube, Instagram) to build anticipation and communities around new shows?

- **HMW use data and personalization** to deliver the right content to the right audience at the right time, thereby increasing engagement and loyalty?

## Strategic Actions & Recommendations:

The roundtable's marketing discussion centered on blending **cutting-edge digital strategies** with culturally attuned content promotion. Recommended actions include:

- **Harness Social Media and Content Creators:** Given the UAE's social media dominance, streaming services should treat platforms like YouTube, TikTok, Instagram, and Snapchat as integral to their distribution strategy. Short-form video teasers and viral challenges can create buzz for new releases. For example, a creative TikTok campaign or hashtag challenge around a Dubai-based series can tap into the UAE'sTikTok reach (which stands at an astonishing 118%+ of the 18+ population in 2024). Influencer marketing is particularly powerful in the region – nearly one third of UAE internet users follow influencers, and authentic endorsements can drive viewers to try a new service or show.

*Recommendation*: Platforms should partner with local YouTube and TikTok creators to produce behind-the-scenes vlogs, reviews, or comedy skits related to their original content. YouTube is essentially a second television in MENA, so having content like trailers, cast interviews, or web extras on YouTube (with Arabic and English subtitles) will capture the 94% of UAE's online population active there. Additionally, consider scheduling content drops around social media trends and cultural moments – e.g. releasing a music video from a series soundtrack on YouTube during Eid holidays when viewership spikes.

- **Personalization and Data Analytics:** Adopting advanced recommendation engines and real-time analytics will markedly improve audience reach and retention. As Warner Bros. Discovery notes, "real-time data" allows continuously refining content recommendations, surfacing the right title to the right user at the right moment. Dubai-based platforms (and even traditional broadcasters entering streaming) should invest in personalization algorithms akin to Netflix's. Shahid has done this to great effect – its AI recommendation engine boosted average view time per session by 35% after implementation. By analyzing viewer data, platforms can micro-segment audiences (e.g. Khaleeji drama fans, South Asian expats, kids content viewers) and tailor marketing messages to each. For instance: a service might send a push notification in Arabic about a new Gulf comedy to one user, while another user gets an English trailer of a Hollywood movie – based on their profiles. The roundtable also suggested creating feedback loops with data: continuously monitor what content is trending or underperforming in Dubai/MENA and adjust marketing spend accordingly (a practice global streamers employ weekly).
    - *Proposed idea:* Train or hire data analysts in marketing teams and utilize AI tools for sentiment analysis on social media to gauge audience reactions in real time. This data-driven agility means marketing campaigns can pivot instantly if a piece of content suddenly goes viral or if engagement drops.

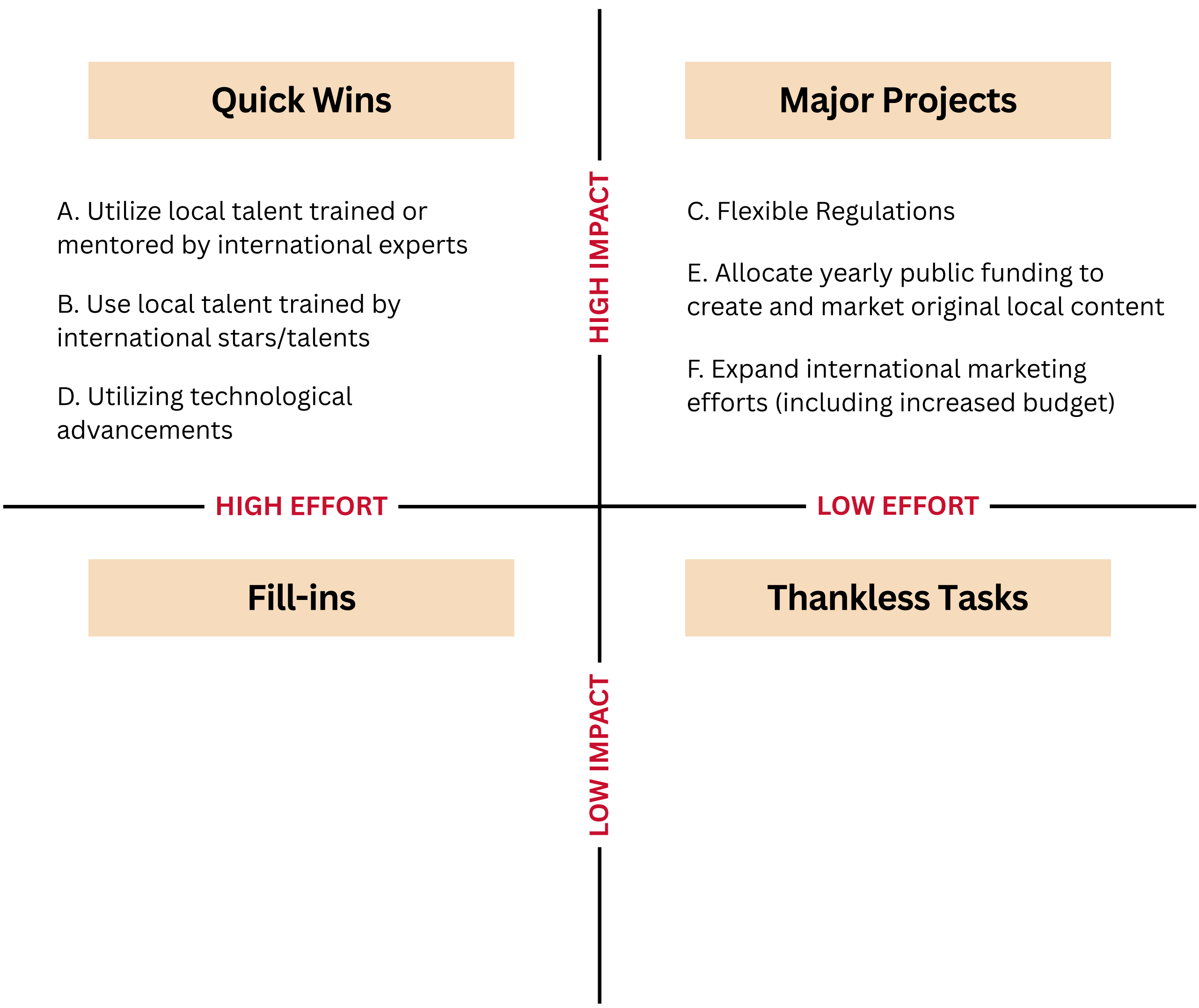
- **Localization of Marketing Content:** While English is widely used in UAE advertising, marketing in Arabic and other key languages (Hindi, Urdu, Tagalog for expat groups) is crucial for broad reach. Bilingual campaigns ensure inclusivity – for example, creating trailer versions with Arabic voice-overs and others with English text so that both Emiratis and expatriates feel addressed. As a benchmark, many UAE brands now produce social media posts in both Arabic and English to maximize engagement. Streaming platforms should do the same: leverage Dubai's cultural diversity by tailoring promotions to different communities. For instance, a Pakistani expat community event could be sponsored to promote a new Urdu-dubbed series on OSN+, or Arabic radio spots can advertise a trending Arabic original on Netflix/Shahid during Ramadan. Cultural timing is also key – aligning marketing withRamadan drama season, or using local festivities (like UAE National Day or Dubai Shopping Festival) for special content releases and offers, was noted as a smart tactic. The underlying principle is cultural resonance: campaigns must speak the audience's language and values. This aligns with WBD's lesson that "it's not about simply localizing global content – it's about creating from the region for the region," and by extension, marketing with genuine local flavor.

- **Telecom & Platform Collaborations for Reach:** One of the most effective user acquisition strategies in MENA has been bundling streaming services with telecom plans. Dubai's telecom operators (Etisalat by e& and du) are critical allies for expanding reach. The recent du–Disney+ partnership, offering 12 months free Disney+ to all du home wireless subscribers, is a prime example of bundling to instantly capture audience. This not only removes cost barriers but converts casual viewers into long-term subscribers by habituating them to the platform's content. The roundtable recommended more such deals: e.g., include Shahid VIP or Netflix with certain fiber broadband packages, or zero-rate (no data charges) streaming traffic for subscribers during special events (like World Cup matches on streaming). These win-win bundles can be supported by co-marketing campaigns – joint adverts by the telco and streamer, leveraging the telco's massive customer base. Benchmark: Globally, Disney+ grew in telecom-centric markets through similar bundles (as seen with Verizon in the US). In the UAE, where OTT competition is fierce, bundling can be a game-changer to quickly scale user acquisition. The government can facilitate these partnerships by encouraging public telecoms to consider local platforms in bundles, not just international ones.

- **Community Engagement and Events:** To deepen audience reach, Dubai can combine online marketing with on-ground engagement. Ideas include fan meet-and-greets with stars of a hit web series, hosted at popular venues like Dubai Mall or during events like Middle East Film & Comic Con. Public screenings or watch parties for season premieres (especially for Arabic series during Ramadan evenings) can generate word-of-mouth buzz. Additionally, cross-promotion with Dubai's tourism and cultural sectors can extend reach – for example, a streaming documentary about Dubai's history could be promoted in Dubai airports and hotels, turning visitors into viewers. Dubai's status as a tourism hub means content featuring the city has marketing value beyond the resident population; a compelling Dubai-made show can be marketed as part of the "Dubai experience."

Overall, marketing in the streaming era is about merging technology with storytelling. By using sophisticated personalization algorithms alongside creative social campaigns, and by rooting outreach in local culture while exploiting Dubai's global links, the city's streaming platforms can dramatically broaden their audience. Ultimately, better marketing and audience engagement will reinforce a virtuous cycle: more engaged viewers lead to more subscriptions or ad views, which fuel revenue to invest in more content – powering Dubai's streaming ambitions.

## Effort vs Impact Matrix:



# Table 3 Monetization & Business Development

## Challenges & Opportunities:

Monetization is the driving force of the streaming industry, and in Dubai's context this means developing sustainable business models in a region where consumer preferences and payment behaviors vary widely. The MENA streaming market has grown rapidly – subscription VOD revenues topped $1 billion in 2023 – yet profitability can be elusive due to high content costs and competition, not to mention the prevalence of free content alternatives. The market is also highly saturated, with numerous global and regional platforms vying for audience attention. With so many options available, consumers are unlikely to subscribe to every service, making competition fierce and increasing the need for distinctive, high-quality content that can stand out. Key challenges identified by the roundtable include: limited willingness to pay among some segments, piracy, and underdeveloped advertising markets. In parts of MENA, consumers historically relied on free-to-air TV or piracy; converting them to paying subscribers requires compelling value and affordable options. Participiants noted that major global platforms often hit a subscriber plateau in emerging markets and "the only way to increase subscribers is to produce local content" that audiences find worth paying for.However, local content requires upfront investment, which is dependant on revenue – a cycle that can be hard to disrupt.

Piracy remains a serious problem, undermining monetization – widespread account sharing or use of illegal IPTVs means lost revenue. The challenge is compounded by gaps in copyright legislation and inconsistent enforcement across the region, which make it difficult for platforms and creators to protect their content from piracy and unauthorized distribution. Moreover, participants mentioned that unlike in larger, more consolidated markets, MENA's fragmented streaming landscape offers limited opportunities to lower costs by growing the customer base. Each platform still has to spend heavily on content, marketing, and operations, and those costs don't drop much even if they gain more subscribers; there is limited economies of scale.

On the positive side, new monetization avenues are opening. Advertising-based streaming is set to boom in MENA – online video ad revenue is projected to grow by 67% by 2028, far outpacing subscription growth. The introduction of ad-supported tiers by Netflix and others, and the rise of Free Ad-Supported TV (FAST) channels, indicate a regional shift towards hybrid models. For example, StarzPlay launched a soft ad-supported service in late 2023 to complement its subscriptions. The market is also seeing sports streaming and pay-per-view events (StarzPlay Sports, Shahid's sports packages) as new revenue streams tapping the region's sports enthusiasm. Furthermore, partnerships and bundles are not just marketing tools but also monetization strategies – bundling with telcos or pay-TV can bring in wholesale revenue and combat piracy by offering legal alternatives at a value price. In summary, Dubai's streaming sector must innovatively blend subscriptions, advertising, partnerships, and potentially new monetization models to maximize revenue while keeping consumers satisfied.

## How Might We (HMW) Questions – Monetization & Business:

The roundtable brainstormed several questions aimed at improving revenue models:

- **HMW reduce piracy** by offering bundled streaming packages that are affordable and convenient, providing consumers a legal alternative that benefits both them and content providers?
- **HMW deter content piracy through stronger laws and enforcement**, making it easier to protect intellectual property and prosecute infringements in the digital space?
- **HMW build a funding and investment ecosystem** that rewards original, culturally relevant content – for instance, by attracting investors to local productions through tax incentives or public co-investment?
- **HMW diversify revenue streams** to complement subscriptions and increase overall ARPU (average revenue per user) without alienating price-sensitive users?

## Strategic Actions & Policy Recommendations:

To strengthen monetization, the roundtable proposed a multi-pronged strategy focusing on **hybrid business models, policy support, and innovation:**

- **Embrace Hybrid Monetization Models:** The era of pure subscription-only streaming is evolving. Dubai's platforms and media companies are encouraged to adopt hybrid models – combining subscription (SVOD), advertising-supported (AVOD), and even free-with-ads (FAST) offerings. Shahid's success illustrates this path: it leads the MENA market with ~22% share and 3.6M subscribers, largely by leveraging a vast free library supported by ads and a premium paid tier for ad-free originals. In fact, Shahid's Chief Commercial Officer noted they "shifted 85% of content from behind the paywall to free", reflecting a strategy to grow ad revenue and reach.
    - *Recommendation:* Dubai-based streaming ventures should ensure they have an accessible free or low-cost entry point to build scale. This could mean a freemium model where basic content is free with ads, and only marquee new series or early access require subscription – a strategy already used by regional broadcasters' streaming apps. Global players like Netflix and Disney+ are also exploring ad tiers in markets like MENA, so local services must stay competitive on price. By growing the user base through free content and converting a portion to paid premium upsells, platforms can maximize both ad impressions and subscriber fees. The government can support this by helping grow the digital advertising market – e.g., convening brands and ad agencies to encourage shifting more ad budgets online, and ensuring measurement standards so that advertisers trust OTT ad metrics. According Omdia, online video advertising is the single biggest growth opportunity in the region's media, forecast to nearly double its share by 2028. Dubai should capitalize on this by becoming a hub for advanced ad-tech and brand integrations in streaming content.

- **Anti-Piracy Enforcement:** Piracy remains one of the most significant threats to monetization in the MENA streaming market, requiring decisive government action.The roundtable emphasized the need for stronger enforcement through coordinated efforts between the Telecommunication and Digital Government Authority, Ministry of Economy, and Dubai Media Council. This should include targeted crackdowns on illicit streaming devices, pirate IPTV services, and account credential sharing networks. Authorities should also collaborate with major digital platforms, such as TikTok, where pirated content is widely circulated and often left unaddressed. Enforcing penalties on retailers who sell hard drives pre-loaded with pirated films and series will help disrupt supply channels. Advanced tools such as digital watermarking, rapid site-blocking protocols, and continuous updates to enforcement methods will ensure regulators stay ahead of increasingly sophisticated piracy operations.

- **Payment Reforms:** To expand the paying customer base, particularly in audience bases with low credit card penetration, the sector must diversify payment options. Incorporating mobile payments and carrier billing would allow customers to subscribe directly through their phone bills, removing friction for underbanked audiences. Flexible pricing models, such as weekly or daily passes, can attract casual viewers who are reluctant to commit to a monthly plan. These lower-cost, short-term options can help convert a portion of the currently non-paying audience into legitimate users, creating incremental revenue opportunities while familiarizing consumers with paid streaming services.

- **Leverage Strategic Partnerships and Bundles:** Partnerships and bundling models can simultaneously drive user acquisition, generate upfront revenue, and act as a tool to combat piracy by offering affordable legal alternatives.

  - *Proposed idea*: a "Dubai Pass" super-subscription – a single discounted bundle that gives access to multiple streaming services in one package; perhaps a collaboration among regional platforms, facilitated by government. The du–Disney+ deal giving a year free Disney+ isn't truly "free" – it's part of a commercial arrangement likely involving a bulk licensing fee paid by du to Disney. These kinds of deals inject revenue into streaming platforms upfront. Dubai's government can encourage local telecoms and even banks to form partnerships with regional streaming startups, providing them capital or minimum guarantees in exchange for offering the service to customers. For instance, Etisalat could bundle a Dubai-based Arabic kids' content app with its family internet plans, paying that app a carriage fee. Such B2B2C models (business-to-business-to-consumer) ensure platforms get paid per user wholesale, reducing their dependency on each user paying individually. Content bundling was also discussed in the context of sports and events: partnering with major events (e.g., Dubai World Cup horse race, Expo events) to provide streaming could create new pay-per-view revenue. The key is creativity in packaging content offerings with complementary services – e.g., include a streaming subscription as part of a cinema loyalty program or with every new smart TV sold in the UAE; the latter is something Samsung and other smart TV manufacturers are doing by pre-loading apps, and even launching their own FAST channels.

- **Explore New Monetization Frontiers:** In line with Dubai's innovative spirit, the roundtable encouraged looking at emerging business models. One intriguing area isblockchain and NFTs for content monetization. Dubai's Virtual Assets Regulatory Authority (VARA) is already preparing regulations for next-gen media monetization including NFTs and tokenized content rights. A platform might, for example, sell NFT collectibles or limited edition digital merch for popular shows (generating fan-based revenue beyond viewing). Another area is live and interactive streaming – leveraging Dubai's strengths in live events. Imagine interactive live-streamed concerts or esports tournaments from Dubai that viewers worldwide pay to access. Dubai could become a regional center for such events, blending streaming with live experiences, somewhat similar to how Amazon Prime streams Thursday NFL games in the US, but here it could be regional sports or concerts. Additionally, the rise of sports streaming itself is a monetization angle: platforms are investing in rights for cricket, soccer, MMA etc., knowing fans will subscribe or pay per match. Dubai can support this by perhaps helping local entities bid for regional sports rights or host exclusive esports leagues on streaming. Finally, consider localized merchandising and franchising; a hit series IP made in Dubai can spin off revenue through merchandise, location-based experiences, etc., contributing to the content's profitability. The UAE's ecosystem of malls and attractions can be leveraged to sell what viewers see on screen, closing the monetization loop.

In conclusion, monetization in Dubai's streaming sector will thrive if it adapts to local realities through hybrid models and flexible pricing, while fighting piracy and embracing innovation. Industry analysis projects MENA streaming revenues will keep a strong upward trajectory, with regional players like Shahid and OSN+ "at the forefront of innovation and growth". By implementing the above strategies, Dubai can ensure that streaming businesses not only attract viewers, but also convert that viewership into robust and diversified revenues – fueling continuous reinvestment in content and technology.

# Effort vs Impact Matrix:

HIGH IMPACT

## Quick Wins

A. Government to support & Protect IP, & Copywritted environment

B. Establish partnerships with international platforms for distribution and co-investment

C. Promote co-productions between regional and global streaming platforms

D. Develop universal stories with local roots that can appeal globally

## Major Projects

G. Export locally made content to regional and global markets

H. Offer incentives and rebates tied to content production and distribution

I. Enable bundling of multiple platforms into one user-friendly package

HIGH EFFORT

LOW EFFORT

## Fill-ins

E. Strengthen anti-piracy enforcement through dedicated agencies

## Thankless Tasks

F. Training workshops for monetizing content creation

LOW IMPACT

# Table 4 Industry Enablers & Ecosystem

**Current Landscape:**

The broader ecosystem – infrastructure, regulatory environment, talent pool, and industry networks – forms the foundation on which the streaming sector is built. Dubai has significant advantages. Roundtable participants unanimously praised Dubai's world-class infrastructure: from high-speed broadband and 5G to state-of-the-art studios and post-production facilities in Dubai Studio City and elsewhere. This technical backbone means platforms can deliver seamless 4K streams and creators have access to professional production gear. Dubai also offers a "business-friendly environment with supportive regulations", free zones like Dubai Media City and Dubai Internet City provide tax benefits, 100% foreign ownership, and have attracted numerous media startups and international branches. The government's responsiveness is a strength; policies are evolving in consultation with industry needs as stakeholders cited examples of authorities quickly addressing media sector feedback. Additionally, Dubai's position as a cosmopolitan hub with over 200 nationalities fosters a rich creative environment and multilingual workforce. These strengths position Dubai as a natural regional base for streaming companies.

## Challenges:

However, the roundtable also identified key gaps and pain points in the ecosystem. High costs in Dubai, from living costs to studio rentals, can be prohibitive for startups, independent creators, and young talent. Without intervention, there's a risk that creativity is stifled to those who can afford it.

There are also talent pipeline issues: while Dubai has local and international talent, there's a noted gap in formal training and academia-industry linkage (e.g. no major film/TV school funneling graduates into the sector yet). Gaps in education mean reliance on imported expertise or on-the-job learning, which could slow growth. The regulatory framework for digital content is another area to refine.

The UAE has censorship and age-rating considerations that need balancing–being culturally sensitive while not unduly hampering creative freedom. For instance, having a clear, modern content rating system can help OTT platforms self-regulate content appropriateness. Recently the UAE introduced a 21+ rating for cinema to allow more content in, which is a positive sign.

There's also the matter of intellectual property protection; updating copyright laws for the streaming age and ensuring enforcement remains a continuous need. Lastly, participants pointed out the double-edged nature of emerging tech like AI: while AI can dramatically improve operations, it also raises concerns about content manipulation and job displacement if not handled ethically. An enabling ecosystem must address such concerns.

## How Might We (HMW) Questions – Enablers & Ecosystem: Representative

- **HMW make production infrastructure more accessible** to emerging talent and small creators?
- **HMW attract major global media and tech players** to set up regional operations in Dubai, and encourage local startups, through enhanced incentives and ease of doing business?
- **HMW develop a skilled workforce for streaming** by strengthening academic partnerships and practical training, so that local talent can fill roles across content creation, tech, and management?
- **HMW ensure regulations and policies** keep pace with innovation – supporting new models while safeguarding cultural values and digital rights?

**Strategic Actions & Recommendations:**

Building a robust ecosystem requires coordinated action across government policy, industry initiatives, and education. The roundtable's recommendations include:

- **Enhanced Incentives and One-Stop Support for Media Companies:** To solidify Dubai as the regional streaming and media hub, the government should consider expanding incentives for media companies to base themselves in Dubai. One proposal is to create synergies across free zones – e.g., coordination between Dubai Media City, Dubai Development Authority (DDA), Dubai International Financial Centre (DIFC), and others – to offer "attractive incentive packages for international media companies to set up operations in Dubai". This could include rent discounts in media clusters, fast-tracked licensing, or even relocation grants for studios that move regional HQs to Dubai. Essentially, a "Dubai Media Gateway" initiative, much like how Dubai established itself as a finance hub via DIFC incentives. Example benchmark: twofour54 in Abu Dhabi offers generous rebates and facility subsidies to lure productions; Dubai can compete by marketing not just incentives but the whole lifestyle and opportunity package for creatives, as one participant noted, "Dubai isn't just a place to work – it's a place people want to live", giving it an edge in talent attraction. Hand-in-hand with incentives is the idea of a Centralized Media Authority or Council to serve as a one-stop shop for all streaming industry needs – from content classification to startup incubation. This body could help new entrants navigate regulations and connect with local partners, significantly lowering the soft barriers to entry.

- **Cost of Production Relief Measures:** Addressing high local costs is critical for ecosystem inclusivity. The roundtable suggested measures like scalable studio rental rates – charging reduced rates for local indie productions and higher rates for big international shoots. Implementing this would ensure affordable access for independent projects and student films, while still monetizing international projects that have larger budgets. The government can subsidize certain costs; for instance, provide free or low-cost use of public locations for filming student/indie content. In terms of living costs, extending creative individuals the benefits of initiatives like the Golden Visa for creatives helps by offering residency security and sometimes sponsorship flexibility. Dubai might also look at housing solutions for creative community, e.g. explore partnerships to offer discounted housing in art districts for resident creators, to mitigate the talent drain due to cost of living.

    - *Proposed idea:* establish a shared equipment and co-working hub for creators – a physical space in Dubai Studio City or elsewhere where emerging creators can book cameras, editing suites, or small studios at nominal fees. Such creator hubs exist in cities like Seoul and Paris, often supported by municipal authorities, and they significantly lower the barrier for entry-level creators to practice and produce content.

- **Education, Training & Academic Linkages:** To cultivate a steady pipeline of skilled professionals, stronger partnerships with educational institutions are needed. integrating media tech into university curricula is key. Dubai's universities could be encouraged (via grants or challenge funds) to establish specialized programs in streaming technology, digital marketing analytics, or content production management. For instance, a collaboration between Dubai universities and renowned film schools could greatly enhance local capabilities. On-the-job training subsidies should be part of this ecosystem: incentives for companies to take on interns or apprentices so graduates get real-world experience. Furthermore, creating an industry-academia council to conduct research on MENA audience trends and content strategy would provide valuable data to local companies, addressing the earlier point that "there's a need for more data-driven insight into Middle Eastern audiences". This can be a joint effort – perhaps Dubai Media Council sponsoring an annual "State of MENA Streaming" report with a local university, to make Dubai a knowledge hub for media trends.

    - *Proposed idea:* The roundtable recommended launching programs such as Dubai Media Summer Camps or Bootcamps to expose students to streaming and content careers. These could be short courses in filmmaking, digital content creation, VR/AR storytelling, etc., run with support from industry mentors. Additionally,

- **Progressive Regulatory Framework:** As streaming blurs lines between broadcasting, cinema, and user-generated content, regulations must evolve. The UAE's Media Regulatory Office has already modernized some rules, such as age ratings, more flexible censorship for international releases. Going forward, Dubai can champion a "light-touch, future-proof" regulatory approach. This means continuing to uphold cultural values but doing so through transparent classification rather than restrictive bans. The roundtable specifically highlighted the importance of updating copyright and IP laws for digital content, and enforcing them via coordination with banks and ISPs to cut off pirate revenue flows. Another regulatory frontier is virtual assets in media: enabling monetization via crypto or NFTs could differentiate Dubai as a pioneer. Since VARA is already looking at blockchain content rights, perhaps Dubai could pilot a platform for NFT ticketing or fractional ownership of film rights, under regulatory sandbox conditions. On the content moderation side, authorities might provide clearer guidelines for OTT platforms on prohibited content categories, so platforms can self-regulate effectively. Finally, with technologies like AI-generated content, policy will need to address questions of content authenticity and labor. Dubai could collaborate in international forums to develop ethical guidelines for AI use in media, such as requiring disclosure when characters or voices are AI-generated, to maintain trust and protect jobs. By proactively shaping such policies, Dubai can ensure innovation isn't stifled while maintaining safeguards.

In summary, Dubai's ecosystem for streaming is already fertile; with targeted enhancements it can become truly unparalleled. The Gulf News aptly described the UAE as the "technological backbone of MENA's streaming future," thanks to its combination of infrastructure, cloud capabilities, regulatory agility and global connectivity. By reducing costs, investing in people, and future-proofing policies, Dubai will strengthen that backbone. The result will be an environment where both global players and home-grown startups thrive side by side – all benefiting from Dubai's efficient infrastructure and supportive governance.

## Effort vs Impact Matrix:

HIGH IMPACT

HIGH EFFORT — LOW EFFORT

LOW IMPACT

### Quick Wins

A. Introduce or expand a rebate system to attract productions

C. Organize storytelling workshops and summer camps to develop new "Emirati" narratives

### Major Projects

B. Provide grants to support emerging and existing talent

D. Offer scalable production rates: lower for local/indie, standard for international

E. Expand training opportunities across disciplines (production, writing, post-production)

F. Form partnerships with global entities to drive investment and collaboration

G. Enforce protection laws for intellectual property and regulate piracy

### Fill-ins

H. Promote affordable production spaces for emerging creators in Dubai

### Thankless Tasks

I. Create a structured package of "soft incentives" (e.g., visas, relocation support, housing)

J. Build a collaborative and encouraging media ecosystem to grow the local talent pool and original content output

# Conclusion: A Strategic Vision for Dubai’s Streaming Powerhouse

Drawing together all these threads – strong foundations, targeted improvements, and ambitious initiatives – we arrive at a compelling vision: Dubai as the pre-eminent creative hub of the Middle East, and a rising player on the global media stage. If the strategies outlined in this paper are pursued, what might Dubai’s streaming and media sector look like in 2030?

Imagine a Dubai where multiple hit series and films produced locally are topping charts across the Arab world, and even making waves globally. It’s a future where a young filmmaker from Dubai could see her web series become the next Netflix international success, where studio soundstages in Studio City are booked year-round with co-productions involving Hollywood, Bollywood, and Arab partners, and where the Dubai brand is synonymous with quality content and innovation in media.

In this envisioned future, Dubai firmly establishes itself as the regional headquarters for media innovation, overtaking older centers like Cairo or newer aspirants like Riyadh in certain domains. As one analysis put it, the UAE is fast becoming one of the most advanced streaming markets both in consumption and as a base for OTT infrastructure and investment. By 2030, Dubai could host the MENA head offices of all major streaming companies, plus a vibrant ecosystem of homegrown platforms addressing various niches. The city would be the default location for pan-Arab productions – the place where a Lebanese director, an Egyptian star, and a Saudi producer come together to shoot the next big Arabic series, because Dubai offers the facilities, incentives, and cosmopolitan environment to support it.

Dubai's unique east-west connectivity will by then also make it a hub for cross-pollination between markets. We may see more content that isn't just "Arabic for Arabs" but "from Arabia for the world" – following in the footsteps of successes like AlRawabi School for Girls which resonated internationally . With the population of Arab speakers worldwide and diaspora, Dubai has the potential to be the epicenter of Arabic content, much like Seoul is to K-dramas or Mumbai is to Hindi films. Simultaneously, Dubai will likely facilitate incoming productions: a streaming series from Asia or Europe wanting a Middle Eastern storyline will shoot in Dubai as the cooperative hub, with local crews and talent joining the project. The city's high international accessibility (flights, ease of visas, etc.) and safety make it an attractive production destination, which by 2030 could result in dozens of foreign productions utilizing Dubai annually, each bringing knowledge transfer and global visibility.


By fully embracing the creative economy, Dubai stands to reap significant economic rewards. The Dubai Creative Economy Strategy aimed to double the sector's GDP contribution by 2025 – looking further, by 2030 the media and entertainment sector could become a multi-billion dollar contributor to Dubai's economy. This means thousands of new jobs: not only in content creation, but in related fields like post-production, distribution, marketing, and tech development. A thriving streaming industry will attract FDI. Dubai already ranks #1 globally in attracting FDI in cultural and creative industries as of recent years. Continuation of that trend will see global media companies setting up studios or R&D centers here.

Local investors, too, will become more active in media once they see consistent returns. We might see the emergence of more venture capital funding for media startups, or even the IPO of a Dubai-based media conglomerate on the local stock exchange, signaling maturity of the sector. The roundtable's recommendations like a cultural content fund supported by DMC and private investors might by then have seeded dozens of projects, some of which turned into commercial hits, thus proving the model and encouraging more funding.

Dubai as a creative hub also means the UAE's cultural voice gets stronger globally. Media is a form of soft power; having widely watched content gives the UAE a platform to share its stories, values, and perspectives. In our envisioned future, international audiences might regularly consume shows that present Dubai's way of life, its progressive yet culturally rooted outlook, and its diversity. This can foster greater understanding and admiration for the UAE abroad, complementing the country's diplomatic and economic influence. Domestically, a thriving media scene also means more cultural confidence and preservation – stories of the Emirates, past and present, will be recorded and dramatized for future generations, ensuring that rapid modernization does not come at the cost of cultural memory.

As a hub, Dubai could lead not just in content volume but in media innovation. By 2030, perhaps Dubai will be known for pioneering some new format of entertainment – maybe the first widely adopted interactive Arabic series, or advances in AI dubbing that become the industry norm. With government entities like VARA exploring blockchain and companies experimenting with AI, Dubai might set standards for things like secure digital content marketplaces or AI ethics in media. The city's ethos of embracing tech will reflect in media too: virtual production stages using AR/XR could be a common feature in Dubai's studios, meaning local creators can produce big-budget-looking content at lower cost, outsmarting bigger markets. Dubai's willingness to be a testbed – such as hosting a large-scale trial of 5G streaming way early – could mean by 2030 it's doing the first 8K resolution live stream in the region, or rolling out whatever new immersive streaming is available, ahead of others.

Unlike more monolithic markets, Dubai's diversity will remain its superpower. The hub vision includes being a place where content from various languages and genres intersects. The presence of communities from around the world means Dubai-based creators can find inspiration and collaborators across cultures. We may see more fusion content as Dubai can prove that diversity in front of and behind the camera leads to stories with wide appeal. The marketing ecosystem, as discussed, will amplify these to the right audiences. Meanwhile, local audiences benefit by getting content that reflects their multifaceted identities – a person in Dubai might see their multicultural friend group mirrored in a fictional webseries, which is quite unique to cities like this.

By 2030, one would expect that many of the recommended policies are fully implemented: a unified content guideline framework across the UAE, robust enforcement that has drastically minimized piracy, and education pipelines routinely producing skilled media graduates. If these come to pass, they form a solid backbone for everything else. Government agencies likely will measure success by the number of productions made,awards won, and the growth of media's GDP share. Given the leadership's focus, these metrics will be tracked and targeted.

## Recommendations and Next Steps:

To conclude, here is a summary of **future-facing recommendations** distilled from the analysis:

- **Establish Financial Incentives:** Implement a competitive rebate or tax credit program for productions in Dubai to draw international projects and empower local ones . Simultaneously, create a content fund for local original productions (public-private funded) to de-risk creative projects and encourage originality .

- **Enhance Talent Development:** Launch structured programs for talent – e.g. national training schemes, mentorship programs with industry veterans, and partnerships with global film schools. Set up the proposed Dubai Creative Academy for practical skills training. Continue offering and even expanding Golden Visas to attract top global talent in key shortage roles (showrunners, VFX supervisors, etc.).

- **Unify and Update Regulations:** Expedite the centralization of content guidelines via the UAE Media Council, and involve industry in periodically updating them to keep pace with societal norms. Consider pilots for relaxed restrictions under controlled release to gauge audience appetite for more diverse content . Also, maintain strong IP enforcement momentum – make the Anti-Piracy Lab fully operational and integrate its findings into faster legal actions (e.g. blocking a pirate stream within minutes). Aim to reduce digital piracy to minimal levels by making legal options affordable and accessible (e.g. via the bundling approach) .

- **Promote Co-Productions and Export:** Actively market Dubai as the co-production partner of choice. The responsible government can broker co-production deals and possibly sign treaties with 5–6 key countries. Establish a Dubai Content Market event to connect creators with global distributors, boosting exports. Encourage every locally funded project to plan for international festival or platform submissions, backing them with subtitling and travel grants if needed. This way, Dubai-made content consistently travels and gains global exposure.

- **Drive Monetization Innovation:** Support experiments in monetization: for instance, trial a cross-platform bundle (a “Gulf Streamer Pack”) perhaps with government coordination initially . Monitor new trends like micropayments, and be ready to integrate them (e.g. allow users to pay per episode for some premium content, via mobile payment, which in some emerging markets proved popular). Ensure regulatory frameworks (like payment regulations) accommodate these innovations. Also, consider public service campaigns against piracy to culturally stigmatize it, complementing enforcement with education.

- **Foster Community and Marketing:** Build on Dubai’s community culture. Create a physical “Creators’ HQ” space (building on the announced Creators’ HQ) where influencers, YouTubers, and filmmakers can collaborate, attend workshops, and get support. Such a hub can amplify the creator economy and feed content into streaming platforms. Continue investing in local content marketing – like a “Made in Dubai” badge or campaign that brands and promotes content produced in the emirate as a mark of quality.

- **Leverage Technology Strategically:** Form an AI & Media task force that continuously evaluates new tech and publishes guidelines or best practices for integration in content and operations . Possibly incentivize local tech startups that focus on media solutions by giving them grants or preferential office space. The goal is to keep Dubai one step ahead in tech adoption, ensuring its media industry is among the most advanced (a status it’s already chasing with 5G and cloud use ).

By nurturing Dubai's creative talent, protecting and monetizing their work, and broadcasting their stories to the world, Dubai can cement its status as the nexus of streaming in the Middle East. More so, it can be a shining example of a global media city, one that proves how diversity, innovation, and strong public-private synergy can create a thriving, future-ready creative economy.

Dubai has long been a forward-thinking city, and in media and streaming, that future is unfolding today. The next few years will be pivotal, and with continued momentum, they hold great potential. It's the right time for stakeholders to invest, the government to craft bold policies, and creators to bring their ideas to life. The world will be watching Dubai, eagerly, on its screens.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