

# **Middle East & Africa Video Streaming Software Market Segmented by Component (Solutions (Transcoding & Processing, Video Delivery & Distribution, Video Analytics, Video Management, Video Security, Other), Services (Professional, Managed)), By Streaming Type (Video On-demand Streaming, Live Streaming), By Deployment Type (On-Premise, Cloud), By End User (Broadcaster, Operators & Media, Enterprises, Education, Healthcare, and Others), By Country, By Competition, Forecast & Opportunities, 2018-2028F**

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## **Abstracts**

Middle East & Africa Gas Gensets Market has valued at USD 2.96 billion in 2022 and is anticipated to project robust growth in the forecast period with a CAGR of 3.51% through 2028. Natural gas is readily accessible in numerous MEA countries, either through domestic production or imports. This region boasts some of the world's largest reserves of natural gas. Natural gas is widely acknowledged as a cleaner and more environmentally friendly fuel alternative to diesel or gasoline. Its wide availability renders gas gensets an appealing option for both primary and backup power generation.

### **Key Market Drivers**

Increasing Energy Demand and Unreliable Grid Infrastructure

The Middle East and Africa (MEA) Gas Gensets Market is witnessing substantial growth due to several key drivers, with one of the most significant factors being the increasing

demand for energy combined with the unreliable grid infrastructure in the region. The MEA region has experienced rapid urbanization and industrialization, resulting in a surge in electricity consumption. Consequently, there is a growing requirement for reliable and uninterrupted power supply, particularly in remote areas and regions with underdeveloped grid infrastructure.

The unreliable grid infrastructure in many parts of the MEA region often leads to frequent power outages and voltage fluctuations, which can disrupt industrial operations, commercial activities, and essential services such as healthcare and education. To address these challenges, businesses and institutions are increasingly adopting gas gensets as a dependable source of backup power. Gas gensets can rapidly provide electricity during grid failures, ensuring uninterrupted operations and mitigating financial losses.

Moreover, natural gas is readily available in several MEA countries, making gas gensets an attractive choice for both backup and primary power generation. Natural gas is a cleaner and more environmentally friendly fuel option compared to diesel or gasoline, aligning with the region's growing focus on sustainability and carbon emissions reduction. This factor further drives the adoption of gas gensets in the MEA region.

In conclusion, the growing energy demand and unreliable grid infrastructure in the MEA region are propelling the growth of the gas gensets market. Businesses and institutions recognize the significance of having a reliable source of backup power to ensure uninterrupted operations, and gas gensets fueled by natural gas are emerging as a preferred solution due to their availability and environmental benefits.

### Government Initiatives Promoting Natural Gas and Energy Diversification

One of the key drivers of the Middle East and Africa Gas Gensets Market is the proactive involvement of governments in promoting natural gas as a cleaner and more sustainable energy source, while also emphasizing the need for energy diversification. Governments in the MEA region have recognized the environmental and economic advantages of natural gas and are implementing policies and initiatives to encourage its utilization in power generation.

A notable initiative is the establishment of natural gas infrastructure, such as pipelines and liquefied natural gas (LNG) terminals, to facilitate the supply and distribution of natural gas. These infrastructure investments make natural gas more accessible and affordable, thus incentivizing businesses and industries to adopt gas gensets for their

power generation requirements.

Furthermore, MEA governments are actively pursuing energy diversification to reduce dependence on fossil fuels like oil and coal. Diversifying the energy mix not only enhances energy security but also contributes to environmental sustainability by reducing greenhouse gas emissions. Gas gensets, which can be fueled by natural gas or biogas, perfectly align with this diversification strategy, offering a cleaner and more sustainable alternative to traditional fossil fuel generators.

In addition to infrastructure development, governments are providing incentives such as tax breaks, subsidies, and favorable regulatory frameworks to promote the adoption of gas gensets. These incentives help lower the initial capital costs of purchasing and installing gas gensets, making them an appealing investment for businesses and industries in the MEA region.

To summarize, government initiatives that promote natural gas and energy diversification are crucial in driving the growth of the MEA Gas Gensets Market. These efforts not only improve the accessibility of natural gas but also align with global sustainability objectives, making gas gensets an increasingly popular choice for power generation.

### Growing Industrialization and Infrastructure Development

The Gas Gensets Market in the Middle East and Africa (MEA) is witnessing robust growth due to the rapid industrialization and infrastructure development occurring across the region. As economies in the MEA region continue to expand, there is an increasing demand for dependable and efficient power generation solutions to support various industries and infrastructure projects.

One of the primary drivers of the demand for gas gensets is the rising number of industrial facilities, including manufacturing plants, data centers, and mining operations. These industries require a consistent and uninterrupted power supply to maintain their operations and ensure productivity. Gas gensets offer a reliable source of backup power, ensuring that critical industrial processes can continue even during grid outages or voltage fluctuations.

Moreover, infrastructure development projects such as airports, seaports, railways, and smart cities are on the rise in the MEA region. These projects often require decentralized power generation solutions to efficiently meet their energy requirements.

Gas gensets are well-suited for this purpose as they can be easily integrated into these infrastructure projects, providing reliable and cost-effective power solutions.

Additionally, the construction of remote and off-grid facilities, such as oil and gas exploration sites and mining operations in the region, has driven an increased demand for gas gensets. These locations often lack access to a reliable grid, making gas gensets essential for powering equipment and operations in such remote areas.

In conclusion, the growing industrialization and infrastructure development in the MEA region are significant factors driving the Gas Gensets Market. Gas gensets offer a practical and reliable solution for meeting the power needs of industries and infrastructure projects, thereby supporting the region's economic growth and development.

## Key Market Challenges

### Fuel Supply and Infrastructure Constraints

One of the primary challenges confronting the Middle East & Africa (MEA) Gas Gensets Market is the restricted availability and reliability of natural gas infrastructure and supply. Although natural gas is regarded as a cleaner and more environmentally-friendly fuel source compared to diesel or gasoline, its utilization in gas gensets is dependent on a stable and accessible supply. In numerous parts of the MEA region, there are notable obstacles related to natural gas infrastructure, which impede the growth of the gas gensets market.

Firstly, the availability of natural gas varies significantly across different MEA countries and regions. Some countries possess abundant natural gas reserves, rendering it a readily available and cost-effective fuel source for power generation. However, others have limited or no domestic natural gas production and depend on imported gas, which can be subject to geopolitical uncertainties and supply disruptions.

Secondly, the existing natural gas infrastructure, including pipelines and liquefied natural gas (LNG) terminals, may be inadequate to meet the surging demand for gas gensets. Expanding and maintaining this infrastructure can entail considerable expenses and time, resulting in delays in the adoption of gas gensets.

Lastly, the reliability of natural gas supply can be impacted by factors such as pipeline vandalism, gas theft, and operational disruptions, which can affect the uninterrupted

operation of gas gensets. These challenges necessitate businesses and industries to have backup fuel options, further complicating the adoption of gas gensets.

In summary, the restricted availability, reliability, and adequacy of natural gas supply and infrastructure represent significant challenges facing the MEA Gas Gensets Market. Addressing these challenges is paramount for the sustained growth of the market.

### Regulatory and Policy Barriers

The Middle East & Africa Gas Gensets Market encounters a second critical challenge in the form of regulatory and policy barriers that can hinder its growth and adoption. Government policies and regulations play a crucial role in shaping the energy landscape and influencing the selection of power generation technologies. Navigating this intricate regulatory environment in MEA countries poses a significant hurdle for gas genset manufacturers and users.

One of the challenges arises from the inconsistency of regulations and standards across different MEA countries. These variations can create uncertainty for businesses considering investment in gas gensets, as they must contend with differing requirements for emissions standards, safety regulations, and import/export restrictions. Consequently, this can lead to heightened compliance costs and project implementation delays.

Another regulatory challenge is the absence of clear and stable policies that promote natural gas and renewable energy sources, which are often prerequisites for the growth of gas gensets. Inconsistent government support can impede investment in gas gensets, as potential users may question the long-term viability of natural gas as a fuel source or the availability of incentives for clean energy technologies.

Furthermore, issues related to permitting and licensing can impede the deployment of gas gensets. The process of obtaining necessary approvals and permits can be time-consuming and bureaucratic in some MEA countries, resulting in project delays and increased costs.

To overcome these regulatory and policy barriers, it is imperative to achieve greater harmonization of standards, establish clear and stable policies that support natural gas and clean energy, and streamline the permitting processes.

### Economic and Financial Constraints

The Middle East & Africa Gas Gensets Market faces a third significant challenge in the form of economic and financial constraints. These constraints can impact the affordability and attractiveness of gas gensets for potential users, encompassing initial capital costs, ongoing operational expenses, and financing options.

One of the primary economic challenges is the relatively high upfront cost of gas genset systems compared to traditional diesel generators. Natural gas gensets often require specialized equipment, infrastructure, and installation, making them capital-intensive. This cost can act as a barrier for small and medium-sized enterprises (SMEs) and businesses with limited budgets, particularly in regions with limited access to financing.

Moreover, the cost of natural gas supply and infrastructure can also pose economic challenges. While natural gas is often considered a cost-effective fuel option, the investment required to build or expand gas infrastructure can be substantial. Businesses may encounter difficulties in securing funding for such projects, further impeding gas genset adoption.

Additionally, the economic viability of gas gensets is influenced by factors such as fuel prices, maintenance costs, and the availability of skilled technicians for servicing and repairs. Fluctuations in fuel prices or unexpected maintenance expenses can impact the total cost of ownership and affect the return on investment for gas gensets.

To address these economic and financial constraints, stakeholders in the MEA Gas Gensets Market must explore financing options such as leasing, incentives, and subsidies to enhance the accessibility and affordability of gas gensets for a broader range of users. Additionally, efforts to improve the efficiency and reduce the overall cost of gas genset systems can help mitigate these challenges and promote their adoption.

## Key Market Trends

### Transition Toward Cleaner and Sustainable Fuels

One notable trend observed in the Middle East & Africa (MEA) Gas Gensets Market is the increasing focus on cleaner and more sustainable fuel options. With the growing global awareness of environmental issues and climate change, there is a concerted effort in the region to reduce carbon emissions and minimize the environmental impact of power generation. This trend significantly influences the fuel choice for gas gensets.



Natural gas, known for its cleaner emissions and lower greenhouse gas production compared to conventional fossil fuels like diesel or gasoline, is gaining popularity as the preferred fuel for gas gensets. Several MEA countries are investing in the development of natural gas infrastructure, including pipelines and liquefied natural gas (LNG) terminals, to enhance accessibility and cost-effectiveness for power generation. Furthermore, biogas, derived from organic waste and regarded as a renewable and sustainable energy source, is also emerging as an appealing option for gas gensets in the region.

Governments and regulatory bodies are implementing policies and incentives to promote the use of these cleaner fuels in the energy sector. This transition aligns with global sustainability objectives and highlights gas gensets as a crucial technology for reducing the carbon footprint of power generation in the MEA region.

#### Increased Demand for Distributed Power Generation

Another significant trend in the MEA Gas Gensets Market is the increasing demand for distributed power generation solutions. Distributed generation refers to the production of electricity at or near the point of use, rather than at centralized power plants. Gas gensets are well-suited for distributed generation due to their flexibility, scalability, and rapid response capabilities.

The trend towards distributed power generation is driven by several factors. Firstly, it enhances energy security by reducing reliance on centralized grid systems, which can be vulnerable to disruptions. This is particularly critical in regions with unreliable grid infrastructure, where uninterrupted power supply is essential for businesses and industries.

Secondly, distributed generation reduces transmission and distribution losses, making energy delivery more efficient and cost-effective. It also enables the integration of renewable energy sources such as solar and wind with gas gensets, offering a hybrid power generation approach that combines the advantages of clean energy with the reliability of gas gensets.

Lastly, the trend towards distributed generation aligns with the growing need for off-grid and remote power solutions in the MEA region. These include power generation for mining operations, rural electrification projects, and critical infrastructure in remote areas. Gas gensets can play a pivotal role in efficiently meeting these energy needs.

## Segmental Insights

### Power Rating Insights

The Up to 100 KVA segment emerged as the dominant player in 2022. The demand for backup power solutions in the MEA region, particularly in areas with unreliable grid infrastructure or frequent power outages, is a significant driving force for the up to 100 kVA gas gensets segment. Numerous businesses, small industries, and residential complexes rely on these smaller capacity gensets to ensure uninterrupted operations and daily life.

A growing trend in the up to 100 kVA gas gensets segment is the integration of renewable energy sources, such as solar panels, with gas gensets to create hybrid power systems. These systems provide a more sustainable and reliable energy source, combining the advantages of both gas gensets and renewables. The adoption of remote monitoring and telematics solutions is increasing in this segment. These technologies enable users to remotely monitor genset performance, facilitating predictive maintenance, real-time data analysis, and improved operational efficiency.

As SMEs and residential communities continue to expand in the MEA region, the market for up to 100 kVA gas gensets is expected to grow. These smaller capacity gensets are well-suited to meet the needs of this emerging market segment.

In conclusion, the up to 100 kVA segment of the MEA Gas Gensets Market is characterized by robust demand from SMEs, construction projects, and urbanization.

### End User Insights

The Commercial segment is projected to experience rapid growth during the forecast period. The MEA region is currently experiencing rapid urbanization and economic development, resulting in the expansion of the commercial and retail sector. Malls, office complexes, hotels, and retail outlets necessitate a consistent and dependable power supply to operate with efficiency. Gas gensets are often preferred due to their cost-effectiveness and reliability in providing backup and prime power.

Certain commercial facilities in the MEA region are adopting CHP systems, also known as cogeneration, which employ gas gensets to simultaneously generate electricity and capture waste heat for heating or cooling purposes. This emerging trend enhances energy efficiency while reducing operational costs. The adoption of smart genset



solutions with remote monitoring and control capabilities is on the rise in the commercial segment. These technologies enable businesses to optimize genset performance, monitor fuel consumption, and conduct predictive maintenance.

The MEA region continues to attract tourists and investors, leading to the development of new hotels, resorts, and commercial complexes. Gas genset providers have ample opportunities to supply backup and prime power solutions to these establishments. With the growing reliance on digital services, the demand for data centers and IT infrastructure in the MEA region is expected to escalate. Gas gensets can serve as reliable power backup solutions for data centers, presenting providers with prospects to cater to this expanding market.

### Country Insights

Saudi Arabia emerged as the dominant player in 2022. Saudi Arabia faces significant energy demand due to its rapidly growing population, urbanization, and industrialization. The country's economy heavily relies on industries such as oil and petrochemicals, which necessitate a consistent and dependable power supply. Gas gensets are increasingly utilized to ensure uninterrupted operations during grid outages or maintenance, making them a crucial solution for addressing energy demand and reliability challenges.

Saudi Arabia stands as one of the world's largest producers and exporters of natural gas, boasting substantial reserves and a well-developed infrastructure for gas production and distribution. This abundance of natural gas presents an appealing and cost-effective fuel source for gas gensets. The local availability of natural gas strengthens the business case for adopting gas gensets.

The Saudi government actively promotes the use of natural gas and renewable energy sources to diversify its energy mix and reduce greenhouse gas emissions. Various initiatives, including the Saudi Vision 2030 plan, aim to increase the share of natural gas and renewables in the energy sector. These policies create a favorable environment for the growth of the gas genset market, as they encourage the utilization of cleaner and more sustainable fuels.

The adoption of digital technologies and smart genset solutions is on the rise in Saudi Arabia, offering benefits such as remote monitoring, predictive maintenance, and efficient operation. Industries and businesses looking to optimize their energy infrastructure increasingly prefer smart gensets.

The concept of distributed generation gains traction in Saudi Arabia, particularly for critical infrastructure and remote areas. Gas gensets are employed to provide decentralized and reliable power solutions, reducing reliance on centralized grid systems.

### Key Market Players

Caterpillar Inc.

Cummins Inc.

MTU Onsite Energy

Generac Holdings Inc.

KOHLER Co.

Himoinsa

Jubaili Bros

Doosan Portable Power

Atlas Copco

Perkins Engines Company Limited

### Report Scope:

In this report, the Middle East & Africa Gas Gensets Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Middle East & Africa Gas Gensets Market, By Fuel:

Natural Gas

Biogas

Others

Middle East & Africa Gas Gensets Market, By Power Rating:

Up to 100 KVA

100 to 350 KVA

350-1000 KVA

Above 1000 KVA

Middle East & Africa Gas Gensets Market, By Application:

Standby

Peak Shaving

Continuous

Middle East & Africa Gas Gensets Market, By End User:

Industrial

Commercial

Residential

Middle East & Africa Gas Gensets Market, By Country:

United Arab Emirates

Saudi Arabia

South Africa

Turkey

Qatar

Nigeria

Algeria

Iran

Egypt

Morocco

### Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Middle East & Africa Gas Gensets Market.

### Available Customizations:

Middle East & Africa Gas Gensets market report with the given market data, Tech Sci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

### Company Information

Detailed analysis and profiling of additional market players (up to five).

## Contents

### **1. PRODUCT OVERVIEW**

- 1.1. Market Definition
- 1.2. Scope of the Market
  - 1.2.1. Markets Covered
  - 1.2.2. Years Considered for Study
  - 1.2.3. Key Market Segmentations

### **2. RESEARCH METHODOLOGY**

- 2.1. Baseline Methodology
- 2.2. Key Industry Partners
- 2.3. Major Association and Secondary Sources
- 2.4. Forecasting Methodology
- 2.5. Data Triangulation & Validation
- 2.6. Assumptions and Limitations

### **3. EXECUTIVE SUMMARY**

### **4. IMPACT OF COVID-19 ON MIDDLE EAST & AFRICA VIDEO STREAMING SOFTWARE MARKET**

### **5. VOICE OF CUSTOMER**

### **6. MIDDLE EAST & AFRICA VIDEO STREAMING SOFTWARE MARKET OVERVIEW**

### **7. MIDDLE EAST & AFRICA VIDEO STREAMING SOFTWARE MARKET OUTLOOK**

- 7.1. Market Size & Forecast
  - 7.1.1. By Value
- 7.2. Market Share & Forecast
  - 7.2.1. By Component (Solutions, Services)
    - 7.2.1.1. By Solutions (Transcoding & Processing, Video Delivery & Distribution, Video

Analytics, Video Management, Video Security, Other)

7.2.1.2. By Services (Professional, Managed)

7.2.2. By Streaming Type (Video On-demand Streaming, Live Streaming)

7.2.3. By Deployment Type (On-Premise, Cloud)

7.2.4. By End User (Broadcaster, Operators & Media, Enterprises, Education, Healthcare, and Others)

7.2.5. By Country (United Arab Emirates, Saudi Arabia, South Africa, Turkey, Israel, Qatar, Nigeria, Morocco, Egypt, and Kenya)

7.3. By Company (2022)

7.4. Market Map

## **8. UNITED ARAB EMIRATES VIDEO STREAMING SOFTWARE MARKET OUTLOOK**

8.1. Market Size & Forecast

8.1.1. By Value

8.2. Market Share & Forecast

8.2.1. By Component

8.2.1.1. By Solutions

8.2.1.2. By Services

8.2.2. By Streaming Type

8.2.3. By Deployment Type

8.2.4. By End User

## **9. SAUDI ARABIA VIDEO STREAMING SOFTWARE MARKET OUTLOOK**

9.1. Market Size & Forecast

9.1.1. By Value

9.2. Market Share & Forecast

9.2.1. By Component

9.2.1.1. By Solutions

9.2.1.2. By Services

9.2.2. By Streaming Type

9.2.3. By Deployment Type

9.2.4. By End User

## **10. SOUTH AFRICA VIDEO STREAMING SOFTWARE MARKET OUTLOOK**

10.1. Market Size & Forecast

10.1.1. By Value



## 10.2. Market Share & Forecast

### 10.2.1. By Component

#### 10.2.1.1. By Solutions

#### 10.2.1.2. By Services

### 10.2.2. By Streaming Type

### 10.2.3. By Deployment Type

### 10.2.4. By End User

## 11. TURKEY VIDEO STREAMING SOFTWARE MARKET OUTLOOK

### 11.1. Market Size & Forecast

#### 11.1.1. By Value

### 11.2. Market Share & Forecast

#### 11.2.1. By Component

#### 11.2.1.1. By Solutions

#### 11.2.1.2. By Services

### 11.2.2. By Streaming Type

### 11.2.3. By Deployment Type

### 11.2.4. By End User

## 12. ISRAEL VIDEO STREAMING SOFTWARE MARKET OUTLOOK

### 12.1. Market Size & Forecast

#### 12.1.1. By Value

### 12.2. Market Share & Forecast

#### 12.2.1. By Component

#### 12.2.1.1. By Solutions

#### 12.2.1.2. By Services

### 12.2.2. By Streaming Type

### 12.2.3. By Deployment Type

### 12.2.4. By End User

## 13. QATAR VIDEO STREAMING SOFTWARE MARKET OUTLOOK

### 13.1. Market Size & Forecast

#### 13.1.1. By Value

### 13.2. Market Share & Forecast

#### 13.2.1. By Component

#### 13.2.1.1. By Solutions

- 13.2.1.2. By Services
- 13.2.2. By Streaming Type
- 13.2.3. By Deployment Type
- 13.2.4. By End User

## **14. NIGERIA VIDEO STREAMING SOFTWARE MARKET OUTLOOK**

- 14.1. Market Size & Forecast
  - 14.1.1. By Value
- 14.2. Market Share & Forecast
  - 14.2.1. By Component
    - 14.2.1.1. By Solutions
    - 14.2.1.2. By Services
  - 14.2.2. By Streaming Type
  - 14.2.3. By Deployment Type
  - 14.2.4. By End User

## **15. MOROCCO VIDEO STREAMING SOFTWARE MARKET OUTLOOK**

- 15.1. Market Size & Forecast
  - 15.1.1. By Value
- 15.2. Market Share & Forecast
  - 15.2.1. By Component
    - 15.2.1.1. By Solutions
    - 15.2.1.2. By Services
  - 15.2.2. By Streaming Type
  - 15.2.3. By Deployment Type
  - 15.2.4. By End User

## **16. EGYPT VIDEO STREAMING SOFTWARE MARKET OUTLOOK**

- 16.1. Market Size & Forecast
  - 16.1.1. By Value
- 16.2. Market Share & Forecast
  - 16.2.1. By Component
    - 16.2.1.1. By Solutions
    - 16.2.1.2. By Services
  - 16.2.2. By Streaming Type
  - 16.2.3. By Deployment Type

#### 16.2.4. By End User

## 17. KENYA VIDEO STREAMING SOFTWARE MARKET OUTLOOK

### 17.1. Market Size & Forecast

#### 17.1.1. By Value

### 17.2. Market Share & Forecast

#### 17.2.1. By Component

##### 17.2.1.1. By Solutions

##### 17.2.1.2. By Services

#### 17.2.2. By Streaming Type

#### 17.2.3. By Deployment Type

#### 17.2.4. By End User

## 18. MARKET DYNAMICS

### 18.1. Drivers

### 18.2. Challenges

## 19. MARKET TRENDS AND DEVELOPMENTS

## 20. COMPANY PROFILES

### 20.1. Brightcove Inc.

#### 20.1.1. Business Overview

#### 20.1.2. Key Revenue and Financials

#### 20.1.3. Recent Developments

#### 20.1.4. Key Personnel

#### 20.1.5. Key Product/Services Offered

### 20.2. IBM Middle East and Africa FZ LLC

#### 20.2.1. Business Overview

#### 20.2.2. Key Revenue and Financials

#### 20.2.3. Recent Developments

#### 20.2.4. Key Personnel

#### 20.2.5. Key Product/Services Offered

### 20.3. Kaltura EMEA Limited

#### 20.3.1. Business Overview

#### 20.3.2. Key Revenue and Financials

- 20.3.3. Recent Developments
- 20.3.4. Key Personnel
- 20.3.5. Key Product/Services Offered
- 20.4. Vbrick Inc.
  - 20.4.1. Business Overview
  - 20.4.2. Key Revenue and Financials
  - 20.4.3. Recent Developments
  - 20.4.4. Key Personnel
  - 20.4.5. Key Product/Services Offered
- 20.5. Wowza Media Systems, LLC
  - 20.5.1. Business Overview
  - 20.5.2. Key Revenue and Financials
  - 20.5.3. Recent Developments
  - 20.5.4. Key Personnel
  - 20.5.5. Key Product/Services Offered
- 20.6. Kollektive Technology, Inc.
  - 20.6.1. Business Overview
  - 20.6.2. Key Revenue and Financials
  - 20.6.3. Recent Developments
  - 20.6.4. Key Personnel
  - 20.6.5. Key Product/Services Offered
- 20.7. Cloudinary Technologies Inc.
  - 20.7.1. Business Overview
  - 20.7.2. Key Revenue and Financials
  - 20.7.3. Recent Developments
  - 20.7.4. Key Personnel
  - 20.7.5. Key Product/Services Offered
- 20.8. Dacast MENA FZ-LLC.
  - 20.8.1. Business Overview
  - 20.8.2. Key Revenue and Financials
  - 20.8.3. Recent Developments
  - 20.8.4. Key Personnel
  - 20.8.5. Key Product/Services Offered
- 20.9. OBS Studio
  - 20.9.1. Business Overview
  - 20.9.2. Key Revenue and Financials
  - 20.9.3. Recent Developments
  - 20.9.4. Key Personnel
  - 20.9.5. Key Product/Services Offered

## 20.10. Microsoft Corporation EMEA

20.10.1. Business Overview

20.10.2. Key Revenue and Financials

20.10.3. Recent Developments

20.10.4. Key Personnel

20.10.5. Key Product/Services Offered

## 21. STRATEGIC RECOMMENDATIONS

## 22. ABOUT US & DISCLAIMER

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Product name: Middle East & Africa Video Streaming Software Market Segmented by Component (Solutions (Transcoding & Processing, Video Delivery & Distribution, Video Analytics, Video Management, Video Security, Other), Services (Professional, Managed)), By Streaming Type (Video On-demand Streaming, Live Streaming), By Deployment Type (On-Premise, Cloud), By End User (Broadcaster, Operators & Media, Enterprises, Education, Healthcare, and Others), By Country, By Competition, Forecast & Opportunities, 2018-2028F

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