



# Broadcasting & ICT in the MENA Countries -Prospects & Investment Opportunities-

Chairman's Introduction  
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## Status of TV Broadcasting in the Arab World

In accordance with ASBU latest study, in 2012/2013, compared to 2011:

- The number of broadcast organizations has increased from 608 to 776 (27.6%), of which 26 are public TV organizations and 750 are private.
- The number of satellite TV Channels has increased from 1069 to 1320 (23.5% ).
- The number of public channels has increased from 109 to 168 (54% increase), mainly due to the increase of sports channels from 18 to 41 (227.7%)



## Status of TV Broadcasting in the Arab World

- The number of private TV channels has increased from 960 to 1152 (20%), due to the increase in the number of religious channels from 83 to 135 (62.6%) and lucrative channels from 157 to 210 (33.7%).
- 279 channels are encrypted (29%) and 1041 channels are free to air (79%).
- The number of HDTV channels has reached 103 in April 2013 with an increase of 18% from October 2012. 45 HDTV channels are pay channels, 43 public and 15 private FTA channels



## Satellite Channels Classification

	Public	Private	Total
General	67	254	321
Lucrative	0	210	210
Drama	11	140	151
Religious	11	135	146
Sports	41	84	125
Music	1	123	124
News	5	61	66



## Status of TV Broadcasting in the Arab World

- 121 analogue terrestrial TV channels in the MENA countries will be affected by the analogue switch-off in 2015. While Saudi Arabia and Morocco have started DVB-T transmission , 12 MENA countries plan to deploy DVB-T/T2.
- Mobile TV services & IPTV are mainly provided by Telecom organizations in the Arab world.
- Expanding IPTV services in the MENA countries is affected by low broadband penetration, speeds and bandwidth.



## Status of TV Broadcasting in the Arab World

- OTT is being deployed in the Arab world for Video-on-Demand & Broadcast Streaming Service on the Internet.
- More business opportunities in the region are available with the increasing numbers of connected TVs, Smartphones & PC tablets, used also as second screens while watching TV.
- 3DTV is provided by Al-Jazeera Sports, OSN, Etisalat and Du. Shipments of 3D TV sets to ME countries have reached 27.4 millions in 2012.



## Satellite Operators in the MENA Region

- Arabsat: 450 TV Ch & 4 Pay-TV networks, Badr 6; 5; 4 at 26° E, Arabsat 5A at 30.5° E & 5C at 20° E (Ka).
- Nilesat: Over 700 Ch, 101; 102; AB7 & 201 at 7° W.
- Noorsat: 200 TV Ch including OSN platform, provides capacities on EB2 at 25.5° E, AB4A at 7° W, AB2 at 8° W, EB4A at 40° E & IS15 at 85.15° E.
- Yahsat: 49 HDTV Ch at 52.5° E.
- Gulfsat: 40 TV Ch on Eutelsat 8° W.



## ICT Developments in the Arab World

- Cellular lines increased from 126 million in 2006 to 396 million in the 1<sup>st</sup> quarter of 2013. Cellular penetration ranges from 56.5% in Yemen to 228% in UAE.
- 3G / 3.5G services are offered by 39 operators , and LTE services are commercially launched in 6 Gulf countries.
- 38% of households have internet access, mostly through wireless networks.
- Fixed broadband accounts have reached over 9 million in 2012.





## Broadcasting & the Arab Spring

- In spite of the Arab Spring, the numbers of TV organizations and TV channels have increased, while many political channels were terminated and others launched.
- Pan-Arab news channels played an important role in the Arab Spring news coverage.
- Advertising expenditure was heavily affected in the Arab Spring countries.
- Jamming on satellite channels affected satellite operators covering the region.



## Social Media & the Arab Spring

- Social media has played an important role in communication, organization, coordination and mobilization of the protesters, and in gathering and distributing information.
- In answer to the question “Was the Arab Spring really a Facebook revolution”, it must be mentioned that social media was not a catalyst, the events it describes are the catalysts.



## Social Media & the Arab Spring

- Smartphones proved to be the most important innovation for Journalism , changing the way information is collected , packaged and transferred for mas distribution.
- Facebook is the most popular in the Arab World, where the number of users has reached more than 49 millions in March 2013.