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## THE MIDDLE EAST

*Gholam Khiabany*

In mapping the scholarship and recent interest in the Arab media scene, Helga Tawil-Souri suggests that pan-Arab satellite television is exploding in a number of ways: in quantity, in political terms, as well as an area of academic inquiry.<sup>1</sup> The explosion of Arab media into the scene was heralded as the clearest indication of forces of globalization, renewed faith in the role of media in social change, and prospect of democratization. Yet the rapid process of internationalization from the very start contained a number of significant paradoxes and had the potential to unravel. The financial crash of 2008, followed by the Arab revolts of 2011 and the subsequent political earthquakes in the region, have indeed led to even further media concentration, especially in the hands of Gulf capital.

The explosion of pan-Arab satellite television channels, however, did not happen in a vacuum. Broadly speaking, the concerns for Middle Eastern media are similar to those identified by Herman and McChesney as they pertain to global media in general: the dramatic restructuring of national media and the concentration of media power in the hands of a few players.<sup>2</sup> In the past three decades, many states in the Middle East have introduced economic reforms and policies that have transformed and remolded the region. Such programs, negotiated with the International Monetary Fund (IMF) and the World Bank, are usually labeled as economic liberalization. However, structural adjustment and transformation programs cannot be simply reduced to “economic liberalization,” and the level and scope of economic transformation and changes have been complex. These processes are loaded with contradictions. Media systems in general, and the television industry in particular provide one important and visible example of the attempt to subordinate national economies to the powers of international and domestic capital. As others have suggested,<sup>3</sup> some reforms have not only paved the way for the emergence of new business and social avenues, but have also created new sources of social, political, and cultural authorities that rival and subvert established authorities to certain degrees. The newly established and yet regionally and internationally recognized media “brands” in the Middle East have indeed been a major topic of international communications in recent years.

To that end, however, we cannot begin to discuss the “media giants” of the region without highlighting a few crucial points. First, it is important to remember that while the Arab World is a historical, geographic, and cultural reality, the Middle East is a geographically leaky term.<sup>4</sup> More precisely, the term is a construct, a strategic concept invented by the British Empire. Two major issues tie the region to the “international community,” the United States of America in particular: oil/gas resources and Israel.

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Second, as Sreberny has argued, the region is “a highly differentiated region, along many different kinds of social variables.”<sup>5</sup> Even the Arab World, in which there is a strong and real feeling of collective national identity, is highly differentiated and can be divided into three groups: the oil states (the rentier states of Saudi Arabia, Kuwait, Qatar, United Arab Emirates, Oman, Libya, Iraq, and Algeria), the strategic states (Egypt, Lebanon, Palestine, Syria, Tunisia, Yemen, and Morocco), and the peripheral states, which are actually peripheries within the periphery (Sudan, Mauritania, Western Sahara, Somalia, Djibouti, and Comoros islands). The periphery states do not play a significant political role in the region and it is no accident that they remained “immune” from the revolutionary fervor of the “Arab Spring” in 2011. To be sure, even these groupings can be a little bit misleading, for in each there are variations and diversities that cannot be ignored. For example, Egypt is the most populous country in the Arab World where more than 22% of the region’s people live. Compare this to Lebanon, another country in the “strategic states” group with only 1% share of the region’s population. Egypt also has been in the grip of brutal dictatorship, in contrast to Lebanon where the political structure is organized along sectarian divides. These two countries, however, have played a significant political and cultural role in the region. Nevertheless, both countries have been significant hubs for media and cultural productions despite their differences. Above all, it is no exaggeration to suggest that the countries in the “strategic states” group remain the weakest link in a region that is considered the weakest link in the world system. This is where the heart of Arab revolts beat strongest.

Third, as will be discussed, the “media giants” in the region are explicitly linked to the growth of Gulf capital. Of particular importance has been the emergence and “formation of large capital-groups that dominate the respective economies of the new regional block.”<sup>6</sup> The members of the small Arab states gathered under the umbrella of Gulf Corporation Council (GCC), with a total population of 50 million (of which almost half are migrant workers), have a combined economic output of over \$1.3 trillion. It is important to remember that gross per capita domestic product of some of these GCC countries is much higher than the average of member countries of OECD. Gulf capital is central to the rise, development, and expansion of media in the region and globally. The role of Saudi Arabia (the biggest country in the Gulf region and with a higher population than all other Gulf States combined together) is very central indeed. It is not just the size of audiences in the country that makes Saudi Arabia the major player in the Gulf but also the size of its capital. It is no accident that of the media conglomerates in the region, Aljazeera is the only company that is not controlled by Saudi’s interests.<sup>7</sup>

Fourth, in all cases the development, expansion, and consolidation of media companies have been an integral part of development of state capacity in the region. The economic and political links of media companies to the ruling elites, therefore, are not simply a matter of certain ties to the state or particular lobbying efforts. Trends that have usually been reduced to “economic liberalization,” including within the media industry, are entirely facilitated, maintained, and controlled by the state. Mohamed Zayani has aptly pointed out that in the “Arab world, the media in general and satellite channels in particular, operate under a patron who is either the government or some rich owner who in many cases is associated, in one way or another, with the ruling elite or the government.”<sup>8</sup> The explicit link between media ownership and politics is of course not unique to the region. For example, Silvio Berlusconi’s media empire is a notable case of strong ties between the media and the state in Italy. In the Gulf region, however, one has to use the term “privatization” or “private capital” with extreme caution. The personal ties and patronage have remained key factors in the development and operation of media companies. As Sami Zubaida has pointed out in his discussion of historical forms of the public sphere in the region, “‘Print capitalism’ for instance was rarely capitalist (is it even now?), but dependent on patronage and subvention. And it never consisted just of private persons debating public issues, but always had ties to state, dynastic and colonial interests.”<sup>9</sup> As will be shown throughout this chapter, this is

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still the case and even more so in Gulf-funded media companies. Capitalist development in the region, including the development of media, is politically determined in a number of ways.

Fifth, the broader internationalization of capital in the region and emergence of pan-Arab satellite channels have brought with them not the decline of nation-state as advocated by globalization theories, but the formation of a state with a contradictory role. The product of such existing forces is the formation of a strong state, which is torn, to use David Harvey's terms, between the "logic of capital" and the "logic of territory."<sup>10</sup> For example, Saudi Arabia invested the most in satellite channels and, yet, satellites are officially banned in that country.

Finally, we need to use the label of "giants" for Middle Eastern media companies carefully and relatively. The media corporations that are discussed in this chapter are without a doubt the largest in the region and they are backed by the immensely powerful capital of Gulf States, especially Saudi Arabia. However, they pale in comparison with the likes of other global media giants, like Disney, Apple, Google, or others.

### Middle Eastern Giants in Context

Contrary to exceptionalist theories, which see the Middle East as a sealed space that can be explained either purely in terms of oil revenue or its "culture" (Islam), the region has developed not in isolation from but within the development of global capitalism. Global capitalism is not "external" to the region. As Hanieh points out in his detailed discussion of capitalism and class relations in the Gulf region, "the global economy is part of the actual essence of the Gulf itself—the development of the global 'appears' through the development of the Gulf."<sup>11</sup> The development of media in the region is no exception. Indeed, what has been hailed invariably as the emergence of "contraflow"<sup>12</sup> Arab public sphere,<sup>13</sup> etc. has to be seen as part of the much wider development and circulation of capital and labor in the region. The cross-border and transnational investments and productions in the region go beyond the production of tangible commodities: they encompass significant investment and activity in media and communications. The media field has emerged and become a focal point for the accumulation of capital and power. The "media giants" that are discussed below demonstrate this reality. In this sense, Naomi Sakr is absolutely right in insisting that the development of media in the Middle East, like all discussion of transnational media, should be seen in a much wider global context.<sup>14</sup>

Since the 1990s the number of media channels has increased rapidly. This is particularly the case for television. There were 18 channels in 1993, most of which were state-owned and operated. The first wave of expansion in that decade took advantage of technological development that was mostly targeted at the richest audiences. By 2005 the number had increased to 150, and by 2010 the numbers of channels were estimated at 450. While the numbers have increased rapidly, the field as a whole has been dominated by Saudi Arabia. Since the 2000s, four conglomerates have dominated satellite TV as well as other media: (1) the Middle East Broadcasting Corporation (MBC), owned and controlled by Sheikh Walid al-Ibrahim, who is the brother-in-law of Saudi Arabia's late King Fahd; (2) Arab Radio and Television (ART), owned by Saudi Arabia's Dallah Al Baraka Group; (3) LBC-Rotana, owned and controlled by Saudi Arabia's Kingdom Holding Group; and (4) Orbit Showtime Network, which was established after the merger of Orbit (owned by Saudi Arabia's Mawarid Group) and Showtime Arabia (a joint venture between Kuwait's KIPCO and North American giant CBS). The level of concentration becomes even more obvious if we consider the fact that the Arab World, in general, and the Gulf countries, in particular, is considered as a single market because of shared language. Saudi Arabia's influence is also confirmed by the fact that Arab television industries are particularly keen to cater to the kingdom's television audiences.<sup>15</sup> Two Saudi conglomerates, MBC and LBC-Rotana control one-third of the free-to-air television in Saudi Arabia, Kuwait, and UAE. The number of pay-TV channels is estimated

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close to 150, and audiences of these channels are divided between ART and Orbit Showtime Network.<sup>16</sup> The sector as a whole has been international from the early days, with significant number of mergers and acquisition, cross-media and cross-border ownership, joint ventures with regional and international capital, as well as significant levels of activities across a number of industries.

### Middle East Broadcasting Corporation

It is no accident that the emergence of the Middle Eastern “media giants” can be traced back to the early 1990s when a number of factors began to remold the region, including the intervention in Iraq and increased pressure for economic liberalization. The trendsetter in the media field was the Middle East Broadcasting Corporation (MBC) Group. In approximately three decades, MBC has been transformed into a \$2.9 billion business empire. MBC began its operation from London in September 1991, as the first privately owned Arab network offering non-stop free-to-air television programs. This project was the first promising to reach all Arab citizens inside and outside the region, including literate and illiterate men and women, who were dispersed and scattered in different countries. Two well-connected Saudi capitalists, Sheikh Saleh Kamel and Sheikh Walid al-Ibrahim, funded the creation of MBC. MBC’s desire and intent for international investment and expansion was made clear when it purchased United Press International (UPI), one of the four major international news agencies, for \$3.95 million less than a year after the start of operations. After the acquisition, the company immediately injected \$12 million to upgrade UPI services.<sup>17</sup>

It has been suggested<sup>18</sup> that the owners had different visions for MBC, which is indicated by the fact that the partnership ended in 1993 and Walid al-Ibrahim took complete control of the company. Walid al-Ibrahim’s royal connections and deep pockets assured the success of MBC’s operation, as well as its expansion. MBC’s start-up capital was \$300 million and its annual running costs around \$60 million. Through the same royal connection, MBC was not only able to rent a powerful transponder in which Saudi Arabia was a majority shareholder (Arabsat satellite), but it also obtained a license to launch MBC-FM as the only commercial terrestrial radio in 1994. It also secured a contract to broadcast a number of channels to Saudi homes via a cable network. MBC’s budget and funding shrank as a result of sharp decline in Saudi’s oil income in the late 1990s. Cost-cutting measures soon followed. UPI was sold to the Unification Church of Sun Myung Moon (the owner of the *Washington Times*) in 2000, and in 2001 the company moved its headquarters from London to the newly inaugurated Dubai Media City, an economic free zone created primarily for media productions. Sheikh Walid al-Ibrahim justified the move to Dubai by saying that “they had done a pretty good job in convincing us to move.”<sup>19</sup> The reason for relocation was apparently “‘freedom of speech’ which was the ‘only thing that made us to go to London in the first place.’”<sup>20</sup>

Undoubtedly the restrictions in Saudi Arabia are one factor that has prevented the company being based within the country where it is funded. However, the major disadvantage is that Dubai Media City insists on restrictions over content. As Sakr has suggested, the economic benefits of operating in Dubai Media City are immense. Companies operating in this media-focused economic free zone “were offered 100% tax exemption for 50 years and allowed 100% foreign ownership. But they were not allowed to operate uncensored.”<sup>21</sup> Sakr also suggests that MBC was offered additional incentives. The move from London to Dubai indeed helped MBC to cut its overall costs by 30%.<sup>22</sup> MBC settled in its new location and, with oil prices picking up again, began transforming itself into a multi-channel network.

MBC is part of the Arab Group International (AGI) Holding Company, and the holding company already had a privileged position in Saudi Arabia. In 2003 it began adding to its portfolio of channels. MBC2 was launched in that year and made available by satellite in the region and terrestrially in Bahrain. Unlike MBC, which was a general channel and presented itself as “family

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viewing,” the additional channel tried to tap into a young audience market by acquiring many top American and British entertainment programs, as well as controversial formats such as *Big Brother (al-Ra'is)*, which proved a costly experiment. As Naomi Sakr<sup>23</sup> has suggested, the success of reality TV hits on other channels convinced MBC to be more daring. However while the “love interest” between the participants of the show was a big factor in attracting audiences in other countries, in the Arab World it was controversial. The public protests in Manama, Bahrain and the heated debate in parliament and newspapers forced MBC to suspend the show after just one week in 2004. Controversies over reality TV are not unique to the region. For Kraidy, however, Arab reality TV is intensely controversial “because it violates boundaries of identity and authenticity at a time when these boundaries have been hardened by widespread violence in the Middle East and various controversies over Islam. For some opponents, *al-Ra'is* and *Star Academy* were links in a chain of horrors—Abu Ghayb, Guantanamo, the infamous Danish cartoons, and others baffling Arabs and Muslims.”<sup>24</sup> The tension between the logic of the market, the expectation of various states in the Gulf, and competing ideological agenda were plainly obvious in this case.

In 2004, the company launched MBC3 as a children’s channel and turned MBC2 into a movie channel. Sitcoms and other format programs were moved to MBC4. MBC entertained the plan for a news channel in the 1990s but the plan, despite—or perhaps because of—the Aljazeera success story, was shelved in 1998. The company later revived the idea when it launched *Al-Arabiya* in a joint venture with Lebanese and Kuwaiti investors ahead of the U.S. invasion of Iraq in 2003. *Al-Arabiya* came under the total control of MBC in 2006. In a further move to expand its activities, MBC operates the television news agency Middle East News (MEN). MEN not only shares facilities with *Al-Arabiya*, it also provides technical and logistical support as well as facilities for other clients, including TV stations in Bahrain, Oman, and *Al-Ekhabariya*, which is a news channel directly owned and controlled by the Saudi state.<sup>25</sup> In 2007 the company launched MBC Action and the music channel Wanasah, and one year later it added MBC Persia, MBC Max, and MBC Plus to its portfolio, followed by the launch of MBC Drama in 2010. MBC’s radio channels include MBC-FM, Panorama, HI FM, and Hala FM, all launched between 1994 and 2007. MBC’s expansion has also seen the company making gains in its online presence through Al-Arabyia.net, MBC.net, Shahad Online, Jawal MBC, and MoBC. Such expansion, however, comes at a cost, and a huge one for that matter. This, of course, follows the logic of media capital across the globe, as many don’t really seem to be economically viable when reliant on commercial revenue streams. In 2011, Ali Jaber, the MBC Group TV director, announced that Arab satellite channels are notoriously stricken with financial losses, running at an annual aggregate loss of \$5.5 billion. The running costs are high and are estimated at around \$6.5 billion, while advertising revenue is estimated to be \$1 billion.<sup>26</sup>

### Arab Radio and Television

Arab Radio and Television is part of the Dallah Al Baraka Group, which is controlled by Saleh Abdullah Kamel. The Dallah Al Baraka Group is a conglomerate with significant interests in banking, construction, and tourism. Saleh Kamel is one of the richest and well-connected capitalists in the region. In 2015, *Forbes* listed him as the 17th richest Arab with a net worth of \$2.8 billion.<sup>27</sup> Kamel was born in Taif, Saudi Arabia, grew up in Mecca, and attended Riyadh University. Earlier in his life he worked at the kingdom’s Ministry of Finance, but he left public office to start the Dallah Works and Maintenance Company in 1969 in Riyadh. Despite not being born into the royal family, he is well connected and has remained loyal to the Saudi ruling elite. As Enhab Galal<sup>28</sup> has pointed out, his family was responsible for guiding pilgrims on hajj in Mecca and “his father was employed under the patronage of Prince Faisal bin Abdel-Aziz,” who later became the king of Saudi Arabia in 1964 and ruled the country till his death in 1975.

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The Dallah Works and Maintenance Company became the Dallah Avco Trans Arabia Company in 1975 and expanded its activities from construction to the provision of food, maintenance, and operation services at military bases and hospitals. The company also imports large volumes of consumer products, such as electrical appliances and household technologies. Its major subsidiaries include the Dallah Real Estate and Tourism Company, Al-Samaha Trade Holding Company, Al-Jazira Transport Company, and Dallah Telecom Company. The various activities of the conglomerate are organized through these subsidiaries. The company is also a major shareholder in the Albaraka Banking Group registered in Manama, Bahrain. The company is listed on both the Bahrain Stock Market and NASDAQ Dubai. It introduces itself as “a leading international Islamic banking group providing its unique services in countries with a population totaling around one billion.”<sup>29</sup> The group operates “strictly in accordance with the principles of the Islamic Shari’a”<sup>30</sup>, and in addition to the board of directors it also has a Shari’a supervisory board. The total assets of the group at the end of 2011 were more than \$17 billion, and its principle shareholders are Shaikh Saleh Abdullah Kamel (30.11%), Dallah Al Baraka Holding Company EC (24.64%), Altawfeek Company for Investment Funds (20.65%), and Abdulla AbdulAziz Al Rajihi (6.81%). It has 560 branches in Turkey, Jordan, Egypt, Algeria, Tunisia, Sudan, Bahrain, Pakistan, South Africa, Lebanon, Syria, Iraq, and Saudi Arabia, as well as in Indonesia and Libya. The Dallah group also owns 19% of Al-Jazira bank, which is ranked 34 in the Arab World. In total, Saleh Kamel is active as a shareholder and owner of 340 companies that operate in 42 countries.<sup>31</sup>

The Dallah Al Baraka Group also has interests in media and communication. Dallah Telecom, thanks to the company’s contacts with the Saudi ruling elite, has won major contracts providing CCTV, access control, fire alarm, and anti-intrusion for military facilities, hospital, universities, and private companies in Saudi Arabia. The group’s substantial resources and its rights to major sporting events also allowed it to control and manage the mobile broadcasting rights of large sporting events like the FIFA World Cup, Golf Cup, and Asian Cup. The main media activities of the company are managed and operated through the Arab Radio and Television Company (ART), which was launched in 1993 as a pay-TV subsidiary of the Arab Media Corporation. Saleh Kamel set up Arab Media Corporation in 1977 as one of the early production companies specializing in radio, film, and television. It was, however, through his involvement with MBC that Kamel’s interests in media expanded significantly. In 1993 he sold his share (37.5) to his business partner at MBC and immediately set up his own satellite channel, ART.<sup>32</sup> Saleh Kamel’s Dallah Al Baraka Group controls 70% of ART, and the remaining 30% is owned by another Saudi Prince, Alwaleed bin Talal, who controls a vast range of media in the region, including LBC-Rotana. Bin Talal paid \$240 million for 30% of ART in 1993.

Saleh Kamel had a different vision from Sheikh Walid al-Ibrahim, his partner at MBC, and it was no accident that he set up his own satellite operation as a pay-TV venture. ART had no plans to compete with MBC. For Saleh Kamel, a massive initial investment of \$300 million in this project was not simply a matter of making profits. In fact, as Sakr has argued, both owners of ART seemed happy and willing to subsidize ART from profits of their other businesses since there was no evidence to suggest that the company had made any money from 1994 to 1999. The annual loss of ART was estimated at \$168 million per year. ART advertising revenue in 1998 was less than \$26.5 million, which was a miserly return since in the same year the two shareholders had injected additional \$250 million to cover the extra cost of adding four new channels.<sup>33</sup>

ART was based in Rome and began broadcasting initially from Fucino and later on from Avezzano. In 2002, and after eight years of operation from Italy, ART relocated to the newly inaugurated media city, Jordan Media City. This new location is next to the Jordan Radio and Television building. During the same period, many companies, including MBC and Orbit, began to move their base from Europe to the region. Saleh Kamel apparently believed that there was a

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campaign in the West to undermine Arab culture and tradition as a reason for the move.<sup>34</sup> Undoubtedly there were (and still are) significant anti-Arab and anti-Muslims sentiments, including outright racism and campaigns in the aftermath of the terrorist attacks of September 11, 2001, but the targets of such sentiments were rarely Arab capitalists or ruling elites. But Kamel's claims conceal the real reasons that many companies relocated to the region, which were the favorable tax arrangements and union laws.<sup>35</sup> In fact, many of the big media conglomerates were significant investors in newly established media cities in the region. Jordan Media City, to which ART relocated, is owned by Saleh's Dallah Media Production Company. The site had been there since the 1970s, but the project came to realization after Jordan's free zone law made regulatory changes. In 2004, a spokesman for Jordan Media City announced that ART was expected to reduce its overall operation costs by 60%.<sup>36</sup>

ART's initial catalogue of channels consisted of one general channel, one completely dedicated to sport, one for film, and one broadcasting children programs. This was a period of relentless privatization of media for a number of countries in the region, and Saudi investors or those with connections to Saudi companies and the royal family were the main beneficiaries of auctioning off public assets in the Arab World and elsewhere. ART purchased an extensive catalogue of Egyptian films after the Egyptian Ministry of Culture put them up for sale at a highly discounted price, reportedly \$1200 per film.<sup>37</sup> By 2004 two-thirds of the Egyptian film library was under the control of Saudi capital after Rotana (another Arab media giant) bought thousands of Egyptian films that had been made since 1935.<sup>38</sup> Saleh Kamel also bought a share of the successful commercial broadcaster, the Lebanese Broadcasting Corporation (LBC) in 1996. LBC was the longest-running commercial channel since its founding in 1985 when the Christian-nationalist militia established it.

In a short space of time, ART managed to put together a package of specialist channels of pay-TV, and it dominated this sector. Of reportedly 100 pay-TV channels in the region, ART owned 40. These included 10 sports channels, and Saleh Kamel purchased the rights to the 2002 football World Cup for \$86 million. The next world cup in 2006 cost him \$186 million. The desire for premium content and market domination was also the reason for the company's involvement in the creation of the Arab Football Champion's League. ART also purchased the right to broadcast many other sporting events, including NBA, F1, English and German Premier League Football, as well as UEFA Champions League. ART's package also consisted of five music channels offering a combination of Western and regional music. Film, sport, and music were the kind of premium content that was supposed to make the operation of rapidly expanding Arab television channels commercially viable and successful. Yet, as Booz Allen Hamilton reported back in 2005, while pay-TV had shown strong subscriber growth in the region, this particular sector in the Arab world was highly fragmented. Pay-TV penetration was reported at only a modest 5% across the region, which ranged from 3% in Egypt to 29% in UAE. Therefore, even though ART might have claimed to be the leading pay-TV operator in the region with a market share of 52% in Saudi Arabia, 56% in UEA, 35% in Kuwait, and 85% in Egypt, the actual number of subscribers in a region of 190 million in 2005 barely passed 1 million.<sup>39</sup> The regional and familial connections are not irrelevant here. ART in particular was a strong player in both Saudi Arabia and Egypt.

Saleh Kamel the owner of ART has been keen and adamant that a key role and function of his company is to offer a different vision and view of Islam to the world. He explained the reason behind launching *Iqra* channel as part of his satellite TV package by saying that it aims to cater to "someone like me [who is] not completely to the left or the right—and there are millions like me. [I] wanted to present a more tolerant, middle of the road message to the Arab and other people of the world."<sup>40</sup> With so much controversy over the nature of some of the programs, including music video channels, he insisted that nothing on ART's channels would be shown that he would not want his children to watch.<sup>41</sup>

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In 2009, Kamel sold his sports channels to Aljazeera Sports and the remaining channels to Orbit. Prior to that and in 2003, ART five music channels, which were under the control of Alwaleed bin Talal, were sold to Rotana. Alwaleed bin Talal reduced his share in ART to 5%, and Saleh Kamel was offered an undisclosed share in Rotana. Rivalry and competition were fierce and yet the “common good” of capital and the state remains the most prominent and lays the groundwork for overlaps and collaborations in media industry. The search for power and influence in the case of Saleh Kamel never included a news channel or even news bulletins on his services.

**LBC-Rotana**

LBC-Rotana is without a doubt the largest media company in the Middle East. Saudi Arabia’s Kingdom Holding Company owns it. Kingdom Holding Group is the largest conglomerate in the region, with a wide range of interests from petroleum, gas, construction, and banking to agriculture, aviation, luxury goods, and the media; 95% of the Kingdom Holding Company and 90% ownership of LBC-Rotana is in the hands of Prince Al-Waleed bin Talal, a nephew of the late Saudi King Abdullah, a grandson of Ibn Saud, the first Saudi king, and a grandson of Riad Al Solh, Lebanon’s first Prime Minister. In 2015 *Forbes* magazine listed him as the richest Arab and the 34th richest person in the world, with a net worth of \$22.6 billion.<sup>42</sup> According to *Forbes*, he holds ownership stakes in Twitter, Citigroup, Time Warner, hotel management companies Four Seasons Hotels & Resorts, Movenpick Hotels & Resorts, and Fairmont Raffles Holding; and hotel real estate, including the swanky Hotel George V in Paris as well as a stake in the Savoy Hotel in London. He is among the biggest investors in the Middle East and among the largest foreign investors in the U.S.

The commodity circuits of Kingdom Holding group include Savola, (supermarkets and hypermarkets); Herfy’s fast food; Licensee of SAKS Inc. (handbags, jewelry, cosmetics including Dior, Cartier, Prada, Roberto Cavali, and Valentino); and its financial circuits encompass SAMBA; Citigroup; Industry and Commercial Bank of China, and the Bank of China; Banks in Ghana, Nigeria, Togo, Senegal; PADICO and APIC; 1% or more of total shares in Ford, Eastman Kodak, Hewlett Packard, Motorola, Pepsico, Procter and Gamble, Walt Disney, eBay, Amazon.com; Twitter; News Corporation; and Azizia Commercial Investment Company.<sup>43</sup> The Kingdom Holding Group provides a clearest example of the link between global and regional capitals. Alwaleed is Citigroup’s largest individual shareholder and the second-largest voting shareholder in 21st Century Fox. He also holds approximately 7% stake in News Corporation, and in 2015 he increased his share in Twitter to 5.17%. According to *Forbes* this “equates to a whopping 34.9 million shares worth nearly \$1 billion. It also makes him the second-biggest investor in the company behind co-founder Evan Williams, who owns 6.9%. It puts him ahead of new CEO Dorsey, who owns 3.2%.”<sup>44</sup> In return, News Corporation bought 19% of LBC-Rotana for a reported \$175 million, and in June 2015 France’s Sovereign Wealth Fund announced that it had agreed to invest a minimum of \$150 million in the Kingdom Holding Company. They have also agreed on a separate plan for joint investment of around \$400 million. Saudi Arabia has been at the forefront of Gulf States’ attempt to purchase the most significant and recognizable real estate landmarks in Paris, London, and elsewhere.

Alwaleed, an alumnus of Menlo College in California and Syracuse University, has also made generous donations and investments in North American and European universities. In 2008, the *Times Higher Education Supplement* reported that the prince had donated £16 million to the universities of Cambridge and Edinburgh to set up new centers for Islamic Studies.<sup>45</sup> Both centers are named after him. The Islamic Studies Program at Harvard University, the Center for Muslim-Christian Understanding at Georgetown University, and the Institute for Computational Biomedicine at Cornell University have also received donations from and are named after

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Alwaleed. On the other hand, he has also donated large sums to the University of Cairo and American University of Beirut to set up centers for American Studies and Research. Both of these centers are also named after him.

The Kingdom Holding Group had cemented its reputation at the end of 1990 by paying \$207 million for slightly less than 5% of the crisis-ridden and biggest American bank at the time, Citigroup. In February 1991, he increased his share to 14.9% after spending \$509 million for an additional 10% of shares. In 1999, *The Economist* suggested that Alwaleed's investments were mysterious and speculated that the prince could not possibly have such deep pockets and asked whether he is a front man for other Saudi investors.<sup>46</sup> During the 1990s, Kingdom Holding Group's spending and investment spree which began with purchase of 30% of ART in 1993, 25% of Euro Disney SCA in 1994, and 25% of Rotana Audio Visual (the biggest music label in Saudi Arabia) in 1995, was followed by 50% of a Saudi Telecom company and 3% of Mediaset in Italy. Kingdom Holding Group also purchased shares in Apple, Sony, News Corporation, AOL, Motorola, and advertising agency Satchi and Satchi. By 2003, Kingdom Holding Group had taken full control of Rotana after increasing their stake to 100%. In the same year in a swap deal between the two owners of ART (Saleh Kamel and Alwaleed bin Talal), the five music channels of ART were also added to Rotana's already extensive catalogue. This significant and massive music library provided the ground for the launch of four specialized music channels by Rotana. As Kraidy has suggested, by the mid-2000s "Rotana had become a monopolistic giant in music and music video production, its roster encompassing leading Gulf, Egyptian and Lebanese stars."<sup>47</sup> In 2003, Alwaleed also bought ART's 49% stake in LBC-Sat for \$100 million. LBC, with its entertaining and liberal content, was a particular hit among younger viewers in the Arab World. This represented a growing influence of Saudi's capital in Lebanon.

Kingdom Holding Company also has stake in Lebanese newspapers *An Nahar* and *Ad Diyar*. Another Saudi prince and former deputy minister of defense in Saudi's government is also a shareholder of LBC and owner of pan-Arab newspaper *Al Hayat*. The merger between Rotana and LBC in 2007 consolidated the Saudi's control over more media in the region and, in particular, Lebanon. The assumption is that such mergers and a concentration of media ownership in the region makes commercial sense. According to Kraidy, such development "reflected commercial calculation in a market in which everyone knows that the Saudi viewer is the target of satellite channels . . . because he is advertiser's target (Badi, 2006)"<sup>48</sup> There is not, however, much data to prove such assumption. The field as a whole is not transparent and figures are few and far between. Even though there is little doubt that Saudi Arabia is the biggest and richest market in the Gulf, there is no evidence that media conglomerates get a sizable return for their investments. In fact, as Paul Cochrane, contributing editor to *Arab Media & Society*, pointed out, Kingdom Holding Company's overall asset slumped by 44% in 2008, a net loss of \$8.26 billion.<sup>49</sup> The company responded by slashing music CD prices by 70% (from \$12 to \$4) and sacking hundreds of staff. This is not unique to Kingdom Holding's media business. Aljazeera (the best-known media brand in the region) is also a loss-making operation, with the Qatari government injecting \$400 million every year to maintain it.<sup>50</sup>

The issue of location has been as important for Kingdom Holding Company as it has been for other media conglomerates in the region. LBC-Rotana has operated from a number of sites, but mostly from Beirut. However, the company moved most of its operations to Cairo in 2008 to overcome security concerns. In 2011, Alwaleed moved his headquarters to yet another new free media zone, Manama Media City. Bahrain incentives included rent-free facilities and \$15 million.

However, the fate of Al-Arab news channels raises another layer of complexity and contradiction at the heart of collaboration and rivalry in the region. What was missing from Alwaleed's media business was a news channel that could compete with Aljazeera, MBC's Al-Arabyia, CNBC Arabyia, the U.S.-funded Al-Huraa, Iranian channel Al-Alam, Sky News Arabia, France 24 in Arabic, and

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the BBC Arabic service. The plan for a news channel was announced in 2010 initially as part of LBC-Rotana and later on as independent from Alwaleed's other media business. The channel struck a partnership with Bloomberg Television, which was to provide five hours of regional and global financial and business news. Alwaleed had already relocated much of his operation to Bahrain due to his close links with the Bahraini royal family, and Manama was chosen as the base for Al-Arab since Saudi Arabia doesn't allow the existence of private news channels. The channel was launched and closed on the same day, February 1, 2015. As Gulf News reported, a news ticker appeared on screen explaining the abrupt interruption of broadcast in the following way: "The broadcasting has stopped for technical and administrative reasons and we will resume soon, God willing."<sup>51</sup> In fact, the stopping of coverage was not due to technical fault but rather because Al-Arab had decided to conduct an interview with a leading figure of the Al Wefaq Islamic Society (the main Shia political party in the Sunni-ruled monarchy) over the revocation of the nationality of 72 people in Bahrain. *The Guardian* newspaper reported that "Saudi opposition activists speculated that the decision might have been taken under pressure from Riyadh rather than from Bahrain, indicating a more hardline media stance under King Salman."<sup>52</sup>

**Orbit Showtime Network**

Adam Hanieh suggests that the internationalization of capital in the region's media sector has been further confirmed by the merger of Showtime and Orbit that resulted in the creation of Orbit Showtime Network (OSN). This merger "is a strong illustration of internationalization in the [Gulf Cooperation Council (GCC)]—a joint Saudi/Kuwaiti company, headquartered in the UAE, holding a major share of the market in all GCC countries."<sup>53</sup> Kuwait Projects Company (KIPCO) owns 60.5% and the Saudi investment company, Mawarid Holding, controls 39.5%. Orbit Showtime Network is registered and based in yet another free zone, which is the Dubai International Financial Centre (DIFC). With the merger OSN became the biggest pay-TV provider in the Middle East and North Africa, offering over 100 channels featuring new movies, sports, Arabic content, and international shows.

By the mid-2000s, Orbit, Showtime, and ART were competing in an uncertain and fragmented pay-TV market. Orbit's operations were headquartered in Bahrain and consisted of 32 television and 20 radio channels offered in different packages (bouquet) in the Middle East, North Africa, and Europe. Its services were available through cable in the UAE and Qatar. Showtime, a joint venture between Viacom (21%) and KIPCO (79%), had initially started in London but later relocated to Dubai Media City. Showtime's holdings consisted of 33 TV and 10 radio channels and, like its competitor, it was offering different packages and services in the Middle East and North Africa. A feature of Showtime was its strong Western content, which was secured through exclusive deal with Paramount, DreamWorks, Disney, Sony, and Universal Studios. In terms of their share of the market in the region, both companies were lagging behind ART, except in Kuwait where the Kuwaiti capital majority owning Showtime's share of the market was 50%.<sup>54</sup> The profile of both companies again indicates the diversity of circuits of Gulf capital and its close links with the royal families of the region.

KIPCO is the biggest private company in Kuwait and has diverse interests in banking and finance, insurance, real estate, manufacturing, education, and media. The portfolio of KIPCO encompasses over 60 companies operating in 24 countries. In 2015, its assets were estimated at \$31.3 billion. The KIPCO chairman is Sheikh Hamad al-Sabah, son of the Kuwaiti Amir. The company launched Showtime Arabia in 1996 as a joint venture with Viacom. This joint venture not only gave KIPCO a license from Viacom to use the Showtime name,<sup>55</sup> but also heralded the entry of a global media player into the region.<sup>56</sup>

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Orbit began operating in 1994 from Italy by Mawarid Holding and in direct competition with Saudi-owned ART. The company is owned by a Saudi prince, Khalid bin Abdullah Al Saud. Like other conglomerates in the region Mawarid has diversified business interests in finance, construction, real estate, food chains, medical supplies, and telecommunication. Mawarid's operation consists of 27 subsidiaries. Mawarid's interest in media began with an interest in buying Star TV (based in Hong Kong), but it was Murdoch's News Corporation that added Star to its rapidly expanding international portfolio. Nevertheless, Alexander Zilo, one of the founders of Star TV, was recruited by Mawarid to head his Orbit network.<sup>57</sup> Orbit began with an initial investment of \$1 billion and promised to offer a diverse package targeting affluent viewers. One of the very first acts of Orbit was to sign an agreement with BBC to deliver a news channel in Arabic. The 10-year agreement, however, came to an abrupt end in less than two years after Saudi Arabia objections to its coverage. Declaring itself private and being based in Rome didn't mean that Orbit could escape its affiliation or loyalty to the Kingdom. Through its link with Star TV, Orbit also offered a package of nine channels from Star, which included Star Movies, Star Sports, CNBC, Sky News, and FOX Kids Network. In the same year, 1997, the company also signed an agreement with Disney that included the Disney channel in Arabic and ESPN Sport.<sup>58</sup>

In 2005, Mawarid established Integrated Telecom Company and it immediately consolidated its status as a leading provider of data, satellite, and broadband solutions. Mawarid's intention for expansion of its operation was confirmed when Integrated Telecom Company signed a deal of around U.S.\$1.06 billion with the Korean Middle East Engineering Company (KOMEE) to increase its network coverage by 10,000 square kilometres.<sup>59</sup> However, the company was shut down in May 2013 because of concerns over its financial health and trading violations. The company had been fined \$53 million in September 2012 for violating what Arab Business referred to as "markets laws and listing rules and failing to inform the Communication and Information Technology Commission in writing that it could not pay SR2.8bn worth of financial obligations."<sup>60</sup>

### Concluding Remarks

Media concentration in the Arab World has rapidly surpassed and broken the old state monopolies. In the process, the Gulf states, and in particular Saudi Arabia, have emerged as the new masters. Since the 1990s, members of the Saudi royal family and their associates have established or gained control of MBC, ART, LBC-Rotana, Orbit, and dozens more. The process appears even more complicated because the details of investment, business deals, revenues, and audience figures are seldom reported openly.<sup>61</sup> As Sakr has pointed out, the leading firms have the advantage of backing from powerful political forces and enjoy new forms of patronage. "Among the dominant firms in the Arab television, a high proportion of resource allocation continued to be the sole prerogative of a small, interconnected group of owners who kept their reasons and trade-offs to themselves."<sup>62</sup> We can conclude by highlighting some of the most significant paradoxes of recent developments.

First, and as other have suggested,<sup>63</sup> rapid internationalization of the media sector in the region has had profound cultural implications. The leading firms, dominated by Saudi Arabia, indeed have offered packages and programs that are significantly at odds with their owners' and masters' norms and views on morality. As I stated in the introduction, the feeling of a collective national identity in the Arab World is real and historical and not simply a creation of satellite TV. But the cultural implication of TV programs (of different varieties, including news) has been significant. The logic of capital has provoked a broader cultural transformation in the region. Many of the most popular genres, such as reality TV and music, as Tawil-Souri has observed, have also made their way into religious channels such as *Al Resallah* (owned by Kingdom Holding) and *Iqra* (owned by ART). However, we might also consider how we can understand these explosions now that the Arab Spring has given way to freezing winter and the region is experiencing unprecedented

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turmoil. In 1998, Jon Alterman suggested that the new Arab media might also pave the way for a new kind of Arab identity. Comparing this new kind of Arab identity to the heyday of nationalist movements in the region, Alterman suggested that this “‘new Arabism’ tends to be Islamic-leaning rather than secular, and it emanates from the Persian Gulf rather than the Levant.”<sup>64</sup> The rise of Islamism (in its current phase) certainly provides ample evidence to support his claim.

Second, and as can be seen from the fate of BBC Arabic services for MBC, the extremely short life of the Al-Arab channels and controversies over certain programs, the political and so-called moral sensitivities of the ruling elites impose more than minor limits on the media system. As such, labeling the media barons of the region as modernizers<sup>65</sup> or reformists<sup>66</sup> is deeply problematic. Skovgaard-Peterson is therefore right in highlighting that “however liberal these moguls consider themselves, they are first and foremost members of the topmost elite in undemocratic and illiberal countries, and the reformist tenets of their channels are not intended to change the power relations in them.”<sup>67</sup> They have facilitated the entry of global giants such as Disney and News Corporation and their varied products. Likewise the global giants have been more than happy to collaborate with the ruling families of the region.

The final point to consider is the role of the state. As the data show, the rapid rise and expansion of Arab media that has complicated the global media picture is facilitated and maintained with direct help from Gulf states and in particular Saudi Arabia. This reality inevitably brings to the fore the relationship between capital and state. Questions about the state and capital, as well as their possible independent determining effect on historical developments, remain a contentious issue. In particular, the idea that the state is not subject to immediate or direct control by capital but rather has a degree of autonomy has generated considerable discussion. The “relative autonomy” thesis also has been applied in analysis of the Middle East. Hanieh argues that Rentier-state theory in particular “relies heavily upon a notion of ‘relative autonomy,’ in which the state is seen as a distinct sphere of the political economy with a high degree of latitude to maneuver and deploy economic strategies free from the constraints of the capitalist class.”<sup>68</sup> A general problem with relative autonomy is the difficulty of identifying and specifying the levels and limits of “relative.” But this difficulty is even more acute in the region in which, as Gilber Achcar has argued, the bourgeoisie is “deriving its economic power from the state, while functioning as private capitalism.”<sup>69</sup> The cases examined in this chapter leave no doubt that the species of capitalism that are allowed to develop in the region do so under a particular political context.

The difficulty with the thesis of “relative autonomy” of state can be solved if the state is not seen simply as being outside of social relation and an isolated thing. The state is not external to capitalism but, in fact, it is the mediator of capitalist class. Yet this manifests itself in different ways. The form of this “mediation” varies from country to country. It is precisely the social relations that can help us understand the forms and shifts in mediation. Bob Jessop has argued that “the social content of politics is related mainly to the economic interests of the contending classes and class fractions in specific conjunctures and/or periods, in particular social formation, rather than abstract interests identified at the level of a mode of production”<sup>70</sup> In regions such as the Middle East, particularly in the Gulf region, a simultaneous membership of state institution as well as capitalist class is not novel but rather common. The companies examined in this chapter are clear indicators of the close link between the state and capital. Simultaneous high-ranking positions in the state, the royal family, and the capitalist class are indeed possible and even appear to be the norm. This reality, rather than making the region appearing as “exceptional,” highlights the complexity and the specific conjectures that Jessop has in mind. The boundary between private capital and the state in the Gulf is so blurred that if one wants to insist on “relative autonomy” it makes sense to talk of relative autonomy of private capital from state, not the other way around.

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