

***HDTV & 3DTV
Market Take Up
in MENA Countries***

***Fares Lubbadah
SpaceTech TV Engineering***

On January 1st 2010 :

- The number of Arab broadcasting corporations has reached (398), of which (26) are government owned and (372) are private.
- (696) TV channels are transmitted on (17) satellites, of which (546) are broadcasted and (150 / 21%) are backhauled.
- (97) TV channels are state owned ,of which (49) are general content , (48) thematic .
- (599) TV channels are owned by private companies ,of which(161) are general content & (438) thematic .

Thematic Channels

Item	Channel Classification	State Owned	Private	Total	Percentage %
1	Music / Varieties	3	112	115	23.66
2	Cinema / Drama / Series	6	61	67	13.78
3	Sports	15	41	56	11.52
4	News	3	43	46	9.46
5	Economical / Commercial / Shopping	2	39	41	8.43
6	Religious	4	35	39	8.02
7	Children / Woman / Family	1	34	35	7.22
8	Cultural / Educational	13	18	31	6.38
9	Chat	0	31	31	6.38
10	Documentary	0	13	13	2.67
11	Tourist	1	3	4	0.83
12	Others	0	8	8	1.65
	Total	48	438	486	

- (515 / 74%) TV channels broadcast in Arabic language, (142 / 20%) in English , (14 / 2%) in French.
- All (97) state and (433) private channels are free-to-air, (166 / 24%) private channels are encrypted.
- In addition to Arabsat, Nilesat & Noorsat , covering the Arab World & Europe, the following satellites transmit the Arabic Unified Bouquet of (13) TV Channels :
Hotbird / Europe , Intelsat NSS-7 / Africa, Asiasat 2 /Asia, Telestar 5 /Latin America , Hispassat 1C /South America, Optus 3 / Australia & Newzealand.

- **In comparison with 2008**

- The number of state owned TV channels has increased by (22) channels, i.e by (29%).
- The increase of private TV channels number was by (177) channels, i.e.(42%).
- The number of state owned FM radio stations has increased by 12% reaching (176) , and of private radio stations has reached (162) with a growth rate of 8%.

Regional Satellite Operators

- The Egyptian satellite Nilesat , delivering more than (470)TV and (104)Audio channels, will launch Nilesat 201 satellite in 2010. With (24) transponders in Ka & Ku Bands ,Nilesat will offer HDTV and broadband services.

- Arabsat, carrying (350+) TV channels and (160+)radio stations is launching two new satellites Badr-5 and 5A as scheduled in 2010.

Arabsat plans to build (6) teleport platforms in Bahrain, Iraq , Jordan , Morocco , Qatar & Sudan .

Arabsat , ASBU & Newtec, who were awarded the IBC 2009 Innovation Honor for MENOS project, are planning for extending the service, and developing a range of new products & services.

- Noorsat,, with a total number of TV channels reaching (170), witnessed a growth of revenue from DTH services in 2009 by about 16% ,and plans to lease extra Eutelsat capacity of (3) transponders, and to build new playout, multiplex & transmit systems.
- UAE Yahsat satellite will be launched in 2011 on 52.5 E, providing tri-band coverage of 85+ countries in MENA , South West Asia and Europe.
- The first private Arab satellite “Smartsat” is scheduled for launch in 2011 , targeting MENA and Eastern Europe ICT sectors.

PAY TV Networks

- The last quarter of 2009 witnessed the merger of two Pay TV operators: Bahrain-based Orbit (33 Ch) and Dubai head-quartered Showtime (48 Ch), to create a new company OSN-Orbit Showtime Network. Several new channels including HD will be introduced in 2010.
- Arab Radio & TV-ART-(88 Ch) sold its sports channels and its entire sports folio, including FIFA World Cup broadcast rights for 2010 & 2014 , and the Africa Cup of Nations to Al-Jazeera Sport. ART/ADD transmissions are currently limited to broadcast of movies and series channels, and to distributing tens of backhauled channels.

- Al-Jazeera Sport launched new channels to accommodate the additional sport content, thus increasing the number of sports channels to (12) .
- Al-Majd Satellite Broadcasting is currently transmitting (13) TV channels , of which (7) are encrypted .
- Conditional Access Systems utilized are Irdeto by OSN , Al- Jazeera & ART (in simulcrypt with ViAccess) ,and CryptoWorks by Al-Majd.
- The numbers of Pay TV subscribers are comparatively limited . This may be due to piracy & illegal black market connections , considered as the main threat to Pay TV in the MENA countries .

Media Cities

- Media Cities have continued spreading in the Middle East in 2009, (10) years after the *Egyptian Media Production City* was established in 1997.
- In addition to *Jordan Media City* & *Dubai Media City* created in 2001, (4) other media cities were built in the UAE : *Dubai Studio City*, *Abu Dhabi's Twofour54*, *Ras Al-Khaimah Media City*, *Creative City Fujairah*, as well as another private *Media City in Oman*.
- Other countries (Bahrain, Lebanon, Qatar, Saudi Arabia & Sudan) are also planning or studying the prospects of creating their own Media Cities

Transition to Digital

- The transition from analogue to digital has taken place in TV production , post-production & satellite transmission, but the switch-over to digital terrestrial broadcasting in MENA countries is still at the early stage of implementation.
- DVB-T DTT network has been installed in Saudi Arabia starting mid 2006. In 2009, the network was modernized by adding (36) digital TV transmitters, thus achieving the TV coverage of most of Saudi.
- Projects for building DTT networks are being launched in Morocco , Algiers, Tunis, Egypt & Oman.

HDTV Take Up

- Many MENA broadcasters have upgraded their production infrastructure to HDTV capable. HD flat screen displays at relatively lower prices are becoming more popular at the consumer market.

- A number of private satellite channels have launched HDTV transmission:
 - OSN launched (9) HDTV channels
 - Al-Jazeera launched (2) HDTV channels
 - Evision of UAE is offering a package of (8) HD channels and plans to expand it to (20) at the end of 2010.

- A number of projects for building HD studios & OB vans were implemented by MENA broadcasters in 2009, such as :
 - * *(3) HD studios and a (4) camera OB van were built for Abu Dhabi Al Dafrah group.*
 - * *(2) HD studios for production and news with tapeless workflow were installed in Dammam / Saudi Arabia.*
 - * *SD / HD (12) camera (plus 2 wireless) OB van was built for Qatar TV.*
 - * *Twofour54 of Abu Dhabi launched Intaj HD production facility, operating (5) studios and (22) post production suites.*
 - * *Kuwait TV built an HDTV centre including (2) studios.*

3DTV

- Al-Jazeera recently started broadcasting of a sport 3D channel for the transmission of the Football World Cup 2010 in 3D (in addition to SD & HD).
- Etisalat Operator of UAE has launched a 3DTV sport service.
- Du Operator of UAE has setup its 3D broadcast channel covering fashion, art, travel, sport and lifestyle.
- Al-Dawry & Al-Kass Qatari satellite sport channel announced it has started experimenting 3D systems

- The move to 3D in the Gulf has been led by manufacturers of TV sets.
- 3DTV will take off, but viewing will be limited until removing the viewer need to wear glasses. Other limiting factors for 3DTV at home include lack of content , high production costs , scarcity of channels , bandwidth constrains & the high cost of 3D sets.

Mobile TV & IPTV Services

- Mobile TV services are enjoying a rapid rise in popularity in the Middle East. They are offered in a number of countries including Saudi Arabia, UAE, Bahrain, Kuwait...etc.
- In 2009, DVB-H commercial mobile TV service was launched in Iraq, featuring up to (20) channels for an average subscription prepaid card fee of (15\$) per month.
- DVB-H mobile services will shortly be launched in Sudan following successful test in Khartoum in 2009.

- Recently, The UAE Telecom Regulatory Authority (TRA) issued a 5 year DVB-H mobile TV license to a consortium of telecom operators & broadcast companies.
- Out of (24) million IPTV subscribes world wide, there was only (10,000) in the Middle East in Q1 2009. But IPTV minor platform will be growing quickly, with (6) countries already offering IPTV services (Algeria, Jordan, Lebanon, Morocco, Qatar and UAE), and (7) others (Bahrain, Egypt, Kuwait, Oman, Tunisia, Yemen & Saudi Arabia) planning IPTV launch.

Conclusion

- More broadcasting developments & projects are implemented in the MENA area, and more media business is created, & that is in spite of the Global Financial Crisis.
- With the launch of HDTV, the move to 3DTV & the transition to Broader-Casting, new business opportunities are being presented to broadcasters & ICT providers in the region.