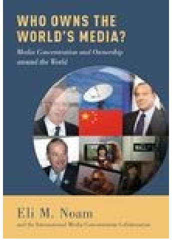


Who Owns the World's Media? Media Concentration and Ownership around the World

Eli M. Noam and The International Media Concentration Collaboration

https://doi.org/10.1093/acprof:oso/9780199987238.001.0001

Published: 2016 **Online ISBN:** 9780190210182 **Print ISBN:** 9780199987238

CHAPTER

29 Media Ownership and Concentration in Egypt

Nagla Rizk, Eli Noam, Paul Mutter

https://doi.org/10.1093/acprof:oso/9780199987238.003.0029 Pages 883–941

Published: January 2016

Abstract

This chapter examines media ownership and concentration in Egypt. Following an overview of the Egyptian media landscape, the remainder of the chapter focuses on print media (newspapers), audiovisual media (radio, broadcast television, multichannel TV platforms, video channels), telecommunications media (wireline and wireless telecom), and Internet media (Internet Service Providers, search engines). The evolution of politics underlies the configuration of the media ecosystem in Egypt. Although the contemporary media landscape in Egypt has become more dynamic within the last decade, government involvement is a cornerstone to the development, or lack thereof, of each sector. The government owns the TV broadcaster ERTU, the wireline incumbent Telecom Egypt, and the three major newspapers. In mobile communications, entrants are Vodafone, Etisalat, and Mobinil.

Keywords: Egyptian media market, telecommunications, Internet, Government of Egypt, Mobinil, Vodafone, Etisalat, Hayat, ART, Al Ahram, Al Gomhouriya, Al Akhbar, ERTU Egyptian media market, telecommunications, Internet, Government of Egypt, Mobinil, Vodafone, Etisalat, Hayat, ART, Al Ahram, Al Gomhouriya, Al Akhbar, ERTU

Subject: Economic Sociology, Social Research and Statistics

Introduction

The purpose of this chapter is to shed light on media concentration and diversity in Egypt.[1],[2] Of particular interest is the interplay between economic and political liberalization, and their impact on the concentration and diversity of the various media industries. The study also examines the impact of media concentration practices on access to content, tools, and platforms.

This chapter covers 10 media industries. Since published data on this subject are not readily available, the figures were collected expressly for this study. The chapter includes an analysis of quantitative and qualitative data gathered through interviews with key stakeholders, industry reports, and marketing surveys by private research agencies. In Egypt, there is a legacy of scarce statistics that reflect media market dynamics, market shares, distribution, and advertising. This is coupled with the lack of transparency of ownership dynamics. This scarcity of information poses a serious research challenge and the lack of transparency and openness raises questions about the control and regulation of media in Egypt.

The chapter starts by introducing the main issues surrounding media concentration in Egypt. This is followed by in-depth coverage of the 10 media industries: print (daily newspapers), audiovisual media
p. 884 (broadcast television, radio, multichannel platforms cable and satellite, and video ↳ channels), telecommunications distribution media (wireline and wireless), and online media (Internet service providers, search engines, and to a lesser extent, online media). Sectors are covered in varying degrees of detail depending on data availability. Media in Egypt has been the subject of the interplay of political and economic powers. Since the military takeover in 1952, Egypt has had a history of controlling and manipulating the public sphere through government-owned and government-controlled media. Gamal Abdel Nasser, president from 1954 to 1970, completely nationalized the media. His successor, Anwar Sadat, president from 1970 to 1981, maintained a tight grip on the media, though he did allow political parties to establish newspapers to promote their ideologies and candidates in 1978.

President Hosni Mubarak, who served from 1981 to 2011, oversaw the liberalization of the media in the 2000s as a product of the liberal economic policies of the 1990s that were created by the Economic Reform and Structural Adjustment Program (ERSAP). This program integrated Egypt into the global economy. Foreign and local pressures were placed on Mubarak to execute political reform. This pressure caused some loosening of the restrictions on media, although the regime's focus was largely on economic growth as "a precondition to democratic change."[3]

Chronologically, media privatization was led by the telecommunications sector in line with the development of Egypt's data backbone. Private participation in telecommunications can be traced back to 1998 with the entry of cellular operators Mobinil and Vodafone.[4] Audiovisual and print media broke away from state monopoly status soon after in 2001. Dream TV became the first private satellite broadcast.[5] Subsequently, the radio industry witnessed its first privately owned station, Nile Radio Production, in 2003.[6] As for daily newspapers, the founding of *Al Masry Al Youm* in 2004 marks the return of the first privately owned and licensed Egyptian newspaper since Nasser's complete nationalization of the press in 1961.[7]

While Mubarak's policies of the early 2000s eased the political barriers to entry and ended state monopoly over most media sectors, they also introduced a new form of concentration. Given the high cost of initial operation, media ownership was limited to a small number of elite businessmen who could afford to invest in such financially burdensome ventures. Therefore, a segment of the media became owned by a small number of "anchor investors"[8] who have a vested interest in the media because they can exert their influence in a way that favors the political environment necessary for their businesses.[9]

While the privatization of the media meant freedom from the state's monopoly over content, freedom of expression remained largely limited by an arsenal of laws. Despite the fact that Article 48 of the 1971 Constitution, now abrogated, guaranteed "freedom of the press, printing, publication, and mass media," the regime used a host of constitutional clauses, laws, and regulations to wield an iron fist over the media. Chapter 3 in Part V of the Constitution granted the president executive powers to issue or stifle legislative
p. 885 laws and to generally rule by decree.[10] Article 48 ↳ of the 1971 Constitution dictated that freedom of the media "shall be guaranteed. . . . However, in case of a declared state of emergency," censorship may be imposed "in matters related to public safety or for purposes of national security."[11] The spirit of media control continued to prevail throughout different constitutional documents that were passed in Egypt since 2011, including the recently passed Constitution in 2014. This constitution includes some relative guarantees for freedom of expression such as the protection of freedom of information and media freedoms and independence, that have not yet translated into an opening up of the media ecosystem.[12]

Additionally, Article 178 of the Penal Code confers authorities the right to imprison and fine anyone who distributes or publishes photos, manuscripts, or any form of material "violating public morals."[13] Indeed, Article 179 of the Penal Code calls for imprisonment for the defamation of the president of the republic.[14] Furthermore, Article 80 describes the fines that can be imposed upon "whoever carries out an activity which influences national interests of the country."[15] More informally, Mubarak's regime continuously interrogated, detained, fined, and even jailed journalists and bloggers. Control of content continued through pressure on TV anchors and newspaper editors.

It is therefore not surprising that Egypt continued to score poorly on the press freedom index of Reporters Without Borders (*Reporters Sans Frontières*, RSF) and has been described as a "difficult situation" at least since 2007.[16] While scores improved slightly between 2007 and 2010, Egypt's performance deteriorated and plummeted after 2011.

As SCAF led the post-Mubarak Egypt in transition, political repression continued. Journalists were attacked, a number of television licenses were revoked,[17] and digital activists were subjected to military trials. Noteworthy here is Law 313 of 1956 amended as Law 14 of 1967, as it prohibits publication and broadcast of information about the Armed Forces, including public knowledge about the military, without prior consent from the director of military intelligence.[18] While SCAF pledged to allow any new station to operate, it repealed this policy by closing Al Jazeera Mubasher Misr and sending warning letters to stations threatening to revoke licenses for not adhering to content as stated in its licenses.[19]

With continuing political pressure on the media before the revolution and during the post-revolution interim military rule, the broad use of this new technology by activists provided alternative outlets for expression. During the Mubarak era, improvements in the country's data backbone helped to substantially increase Internet usage. In 2003, online forums began to emerge as a channel of open expression and public organization. They were replaced in 2006 by social media channels such as blogs, Facebook, and Twitter that allowed great participation in the public discourse and proved to be efficient methods for organizing
p. 886 and mobilizing the public. ↳ Bloggers and social media sites became an increasingly important source of alternative news and views as online audiences continued to grow. In response, mainstream media, including the national press, continued to integrate technologies into its expanding platforms.

Crowdsourced news and political discourse using digital platforms such as Twitter and Facebook gained ground over traditional news media.[20] These online communities created a more interactive audience through producing consumer-generated diversified content.

In March 2012, 11.86% of the Egyptian population (9.9 million people) had Facebook accounts, twice as many people who had accounts in December 2010.[21] By June 2012, that number reached 11.34 million people, 13.56% of the population.[22] Between January and March 2011, the number of active Twitter users in Egypt reached 131,204.[23]

Although the government led developments in Egypt's Internet backbone with the objective of realizing economic gains from technological improvement, it ended up giving rise to citizen media by providing a vent for tabooed political criticism.[24] This is an example of the disconnect between the economic and political agendas typical of Egypt's regime. In this case, they strengthened the technological backbone to promote investments and growth under the economic freedoms agenda, while simultaneously restricting online freedoms of political expression that flowed through these technological pipes. Lifting technological and economic barriers to entry was sufficient to trigger political dissent, even in the presence of the political repression of activists.

In addition to the above, understanding Egypt's media landscape necessitates a consideration of distinctive audience habits of the Egyptian population. As of 2008, 22% of Egypt's population lived below the national poverty line.[25] As of 2006, only 66% were literate.[26] In a country of 84 million people,[27] widespread poverty and illiteracy and the intricate relationship between these two characteristics strongly shape media consumption both in choice of medium and pattern of consumption. Low literacy rates mean consumption is most popular in its visual and audio forms, television and radio. Because of the increased interactivity available on the Internet, online usage is rapidly increasing, even among illiterates.[28]

Also, shared access is an interesting development in the media landscape of Egypt. This ranges from residents of apartment buildings sharing access to an ADSL line, to using cheap satellite receivers to view satellite channels without subscriptions. Also, in less affluent areas, it is a cultural norm and a common
p. 887 economic activity for locals to gather at cafes to watch satellite TV with friends and family.[29] This is done ↳ to reduce costs, but is also an outcome of a culture that favors collective and informal communal activities.

Finally, vertical integration in Egypt is a privilege exercised by the state. The government monopolizes infrastructure and private companies are either politically or economically prohibited from entering the market. The infrastructural aspects of telecom, terrestrial broadcast, and print media are examples of this imbalance.

Introduction

The purpose of this chapter is to shed light on media concentration and diversity in Egypt.[1],[2] Of particular interest is the interplay between economic and political liberalization, and their impact on the concentration and diversity of the various media industries. The study also examines the impact of media concentration practices on access to content, tools, and platforms.

This chapter covers 10 media industries. Since published data on this subject are not readily available, the figures were collected expressly for this study. The chapter includes an analysis of quantitative and qualitative data gathered through interviews with key stakeholders, industry reports, and marketing surveys by private research agencies. In Egypt, there is a legacy of scarce statistics that reflect media market dynamics, market shares, distribution, and advertising. This is coupled with the lack of transparency of ownership dynamics. This scarcity of information poses a serious research challenge and the lack of transparency and openness raises questions about the control and regulation of media in Egypt.

The chapter starts by introducing the main issues surrounding media concentration in Egypt. This is followed by in-depth coverage of the 10 media industries: print (daily newspapers), audiovisual media
p. 884 (broadcast television, radio, multichannel platforms cable and satellite, and video ↳ channels), telecommunications distribution media (wireline and wireless), and online media (Internet service providers, search engines, and to a lesser extent, online media). Sectors are covered in varying degrees of detail depending on data availability. Media in Egypt has been the subject of the interplay of political and economic powers. Since the military takeover in 1952, Egypt has had a history of controlling and manipulating the public sphere through government-owned and government-controlled media. Gamal Abdel Nasser, president from 1954 to 1970, completely nationalized the media. His successor, Anwar Sadat, president from 1970 to 1981, maintained a tight grip on the media, though he did allow political parties to establish newspapers to promote their ideologies and candidates in 1978.

President Hosni Mubarak, who served from 1981 to 2011, oversaw the liberalization of the media in the 2000s as a product of the liberal economic policies of the 1990s that were created by the Economic Reform and Structural Adjustment Program (ERSAP). This program integrated Egypt into the global economy. Foreign and local pressures were placed on Mubarak to execute political reform. This pressure caused some loosening of the restrictions on media, although the regime's focus was largely on economic growth as "a precondition to democratic change."[3]

Chronologically, media privatization was led by the telecommunications sector in line with the development of Egypt's data backbone. Private participation in telecommunications can be traced back to 1998 with the entry of cellular operators Mobinil and Vodafone.[4] Audiovisual and print media broke away from state monopoly status soon after in 2001. Dream TV became the first private satellite broadcast.[5] Subsequently, the radio industry witnessed its first privately owned station, Nile Radio Production, in 2003.[6] As for daily newspapers, the founding of *Al Masry Al Youm* in 2004 marks the return of the first privately owned and licensed Egyptian newspaper since Nasser's complete nationalization of the press in 1961.[7]

While Mubarak's policies of the early 2000s eased the political barriers to entry and ended state monopoly over most media sectors, they also introduced a new form of concentration. Given the high cost of initial operation, media ownership was limited to a small number of elite businessmen who could afford to invest in such financially burdensome ventures. Therefore, a segment of the media became owned by a small number of "anchor investors"[8] who have a vested interest in the media because they can exert their influence in a way that favors the political environment necessary for their businesses.[9]

While the privatization of the media meant freedom from the state's monopoly over content, freedom of expression remained largely limited by an arsenal of laws. Despite the fact that Article 48 of the 1971 Constitution, now abrogated, guaranteed "freedom of the press, printing, publication, and mass media," the regime used a host of constitutional clauses, laws, and regulations to wield an iron fist over the media. Chapter 3 in Part V of the Constitution granted the president executive powers to issue or stifle legislative

p. 885

laws and to generally rule by decree.[10] Article 48 ↳ of the 1971 Constitution dictated that freedom of the media "shall be guaranteed. . . . However, in case of a declared state of emergency," censorship may be imposed "in matters related to public safety or for purposes of national security."[11] The spirit of media control continued to prevail throughout different constitutional documents that were passed in Egypt since 2011, including the recently passed Constitution in 2014. This constitution includes some relative guarantees for freedom of expression such as the protection of freedom of information and media freedoms and independence, that have not yet translated into an opening up of the media ecosystem.[12]

Additionally, Article 178 of the Penal Code confers authorities the right to imprison and fine anyone who distributes or publishes photos, manuscripts, or any form of material "violating public morals."[13] Indeed, Article 179 of the Penal Code calls for imprisonment for the defamation of the president of the republic.[14] Furthermore, Article 80 describes the fines that can be imposed upon "whoever carries out an activity which influences national interests of the country."[15] More informally, Mubarak's regime continuously interrogated, detained, fined, and even jailed journalists and bloggers. Control of content continued through pressure on TV anchors and newspaper editors.

It is therefore not surprising that Egypt continued to score poorly on the press freedom index of Reporters Without Borders (*Reporters Sans Frontières*, RSF) and has been described as a "difficult situation" at least since 2007.[16] While scores improved slightly between 2007 and 2010, Egypt's performance deteriorated and plummeted after 2011.

As SCAF led the post-Mubarak Egypt in transition, political repression continued. Journalists were attacked, a number of television licenses were revoked,[17] and digital activists were subjected to military trials. Noteworthy here is Law 313 of 1956 amended as Law 14 of 1967, as it prohibits publication and broadcast of information about the Armed Forces, including public knowledge about the military, without prior consent from the director of military intelligence.[18] While SCAF pledged to allow any new station to operate, it repealed this policy by closing Al Jazeera Mubasher Misr and sending warning letters to stations threatening to revoke licenses for not adhering to content as stated in its licenses.[19]

With continuing political pressure on the media before the revolution and during the post-revolution interim military rule, the broad use of this new technology by activists provided alternative outlets for expression. During the Mubarak era, improvements in the country's data backbone helped to substantially increase Internet usage. In 2003, online forums began to emerge as a channel of open expression and public organization. They were replaced in 2006 by social media channels such as blogs, Facebook, and Twitter that allowed great participation in the public discourse and proved to be efficient methods for organizing

p. 886

and mobilizing the public. ↳ Bloggers and social media sites became an increasingly important source of alternative news and views as online audiences continued to grow. In response, mainstream media, including the national press, continued to integrate technologies into its expanding platforms.

Crowdsourced news and political discourse using digital platforms such as Twitter and Facebook gained ground over traditional news media.[20] These online communities created a more interactive audience through producing consumer-generated diversified content.

In March 2012, 11.86% of the Egyptian population (9.9 million people) had Facebook accounts, twice as many people who had accounts in December 2010.[21] By June 2012, that number reached 11.34 million people, 13.56% of the population.[22] Between January and March 2011, the number of active Twitter users in Egypt reached 131,204.[23]

Although the government led developments in Egypt's Internet backbone with the objective of realizing economic gains from technological improvement, it ended up giving rise to citizen media by providing a vent for tabooed political criticism.[24] This is an example of the disconnect between the economic and political agendas typical of Egypt's regime. In this case, they strengthened the technological backbone to promote investments and growth under the economic freedoms agenda, while simultaneously restricting online freedoms of political expression that flowed through these technological pipes. Lifting technological and economic barriers to entry was sufficient to trigger political dissent, even in the presence of the political repression of activists.

In addition to the above, understanding Egypt's media landscape necessitates a consideration of distinctive audience habits of the Egyptian population. As of 2008, 22% of Egypt's population lived below the national poverty line.[25] As of 2006, only 66% were literate.[26] In a country of 84 million people,[27] widespread poverty and illiteracy and the intricate relationship between these two characteristics strongly shape media consumption both in choice of medium and pattern of consumption. Low literacy rates mean consumption is most popular in its visual and audio forms, television and radio. Because of the increased interactivity available on the Internet, online usage is rapidly increasing, even among illiterates.[28]

Also, shared access is an interesting development in the media landscape of Egypt. This ranges from residents of apartment buildings sharing access to an ADSL line, to using cheap satellite receivers to view satellite channels without subscriptions. Also, in less affluent areas, it is a cultural norm and a common
p. 887 economic activity for locals to gather at cafes to watch satellite TV with friends and family.[29] This is done ↳ to reduce costs, but is also an outcome of a culture that favors collective and informal communal activities.

Finally, vertical integration in Egypt is a privilege exercised by the state. The government monopolizes infrastructure and private companies are either politically or economically prohibited from entering the market. The infrastructural aspects of telecom, terrestrial broadcast, and print media are examples of this imbalance.

Print Media

Newspapers

Infrastructure and Regulation

The constitution in Egypt allows newspapers to be owned by public or private legal entities and political parties.[30] The press functions under the auspices of the Ministry of Information,[31] where print media operates under the Press Authority Law no. 96 of 1996 and the Publications Law no. 20 of 1936. In compliance with these laws, a publishing license can only be obtained through notification to the Supreme Press Council,[32] subject to the latter's discretion to refuse publishing. Newspapers can only be licensed in the form of joint-stock companies after incurring substantial minimum capitalization fees.[33] Press legislation limits ownership by a single individual to a maximum of a 10% share in any newspaper.[34] However, this law was applied unevenly and those who wished to circumvent it simply appropriated shares to their families and relatives.[35]

Generally, the Supreme Press Council is regarded as the main vehicle for government influence in the sector. It is important to note that the Shura Council (the upper house of parliament) legally owns national press outlets.[36] In commonly fraudulent elections prior to the revolution on January 25, 2011, the formerly ruling National Democratic Party used to win majority seats in the Shura Council. The head of the Shura Council has also been the de facto head of the Supreme Press Council, thereby exposing the latter to significant government control at a time when election results were highly controlled by the ruling regime.[37] Moreover, the Supreme Press Council retains the executive rights to issue licenses to private newspapers.[38] It is yet to be seen how this process will be affected by the 2014 Constitution which rules the setting up of newspaper only by notification and not by authorization.[39]

In order to circumvent opaque licensing criteria, expensive start-up costs, and restrictions on content, over 200 Egyptian-owned publications (including newspapers) registered their titles abroad[40] in countries such

p. 888

as ↳ Cyprus. However, these publications printed their publications locally.[41] Shortly after, a new bureau was established at the Ministry of Information called "censorship on foreign publications" to block this loophole created by independent publishers. The justification for creating this bureau was to protect national security and the morality of the state from foreign conspiracies. In 2001, most licenses were revoked in Cyprus since most publishers did not pay taxes, nor submit annual legal paperwork there. Very few investors now resort to foreign licenses.[42] More private ventures around print media with local licenses emerged after *Al Masry Al Youm* daily was established in 2003, supported by the capital of powerful businessmen.

State-run distribution firms distribute all privately owned newspapers, including independent or partisan titles. *Al Ahram* and *Al Akhbar* are the largest two printing and distribution houses in Egypt. *Al Ahram* has an estimated 7,500 distribution points within the nation.[43] Given the private sector's point of view, securing a large fleet that can cater to Egypt's national needs[44] could result in higher costs as the sheer size of *Al Ahram* allows it to benefit from economies of scale in distribution.[45] A distribution arm may be set up at the rough cost of LE12 million (US$2 million), half of which would cover equipment and vehicles. The rest would cover operational costs. Private media operations have not shown interest in investing in this activity.[46]

The state also monopolizes the print industry for newspapers and newsprint.[47] With the exception of *Al Masry Al Youm*, Egyptian newspapers use state-owned print houses for both printing and distribution.[48] The government uses this monopoly in printing and distribution to influence market competition, and as a vehicle for censorship because newspapers' printing and distribution could be delayed if the content is deemed controversial.[49]

Ownership

The government owns controlling stakes in *Al Ahram* (established in 1875),[50] *Al Akhbar* (established in 1952),[51] and *Al Gomhouriya* (established in 1953).[52] As national press organizations, the law sets ownership dynamics whereby the Shura Council holds 51% of establishment capital and affiliates, with the remaining 49% held by the establishment employees. Accordingly, 50% of the net profits are to be allocated to establishment employees, while the other 50% is to be allocated for "expansion and renovation projects."[53] Indeed, Article 22 of the Law on Press Authority states, "National press establishments shall be considered the property of the state and the Shura Council shall exercise ownership rights over national press establishments."[54] Furthermore, past editors-in-chief

p. 889

↳ of all three papers have been appointees by the president[55] and were commonly selected from members of the formerly ruling National Democratic Party.[56] Since these newspapers have been run by a succession of sycophantic managers who steered clear of red lines surrounding political criticism, this administrational appointment system provided for self-censorship.[57] After the revolution on January 25, 2011, the Shura Council set a series of guidelines for the positions of editors-in-chief, while it opened a nomination door for candidates.

Al Ahram is a giant in Egypt's print industry. Apart from issuing its daily newspaper, its flagship product, the company is the largest printing, publishing, and distribution house in Egypt.[58] *Al Ahram* officially quotes its daily circulation at an estimated 750,000 in 2009, claiming approximately 80% of daily newspaper circulation in Egypt and declaring itself one of the most widely circulated in the Arab world.[59,60] This is a political overstatement and comes in sharp contrast to available statistics. Our own estimate of the market share of *Al Ahram* in 2009 is 29%.[61] *Al Ahram* issues other publications and magazines.[62] According to the officially quoted figures and available statistics in 2011, *Al Akhbar* ranked second in the market and *Al Gomhouria* third,[63] both of which follow the same structure and operate in the same industries as *Al Ahram*, but on a relatively smaller scale.[64]

An alternative voice to the national press existed in the form of partisan newspapers, funded by the individual parties[65] and government subsidies.[66] The press law allowed political parties to establish their own papers that were generally referred to as opposition papers.[67] Due to their reliance on government printing facilities and subsidies, as well as their need for government approval to legally establish a political party, news coverage by partisan papers tends to adopt a cautious attitude toward political criticism.[68] Moreover, often co-opted party leaders themselves assume the papers' editorial.[69] An example is *Al Wafd*, established in 1984 by the economically and politically liberal *Wafd* Party,[70] and managed by the chairman of the Wafd Party, Al-Sayyid Al-Badawi.[71] Of all partisan newspapers, *Al Wafd* enjoyed the largest circulation,[72] estimated at 60,000 in 2003.[73]

p. 890 The first private Egyptian-owned newspaper to be registered locally was *Al Masry Al Youm. Al Masry Al Youm* was founded in 2003[74] by Salah Diab, a prominent member of *Al Wafd Party*.[75] Controlling stakes in the paper are held by a group of businessmen including Diab, Ahmed Bahgat (owner of satellite channel Dream TV), and Naguib Sawiris (owner of majority stakes in Orascom Telecom).[76] It is the only newspaper in Egypt with its own independent print firm.[77] *Al Masry Al Youm* enjoys the highest circulation figures among privately owned newspapers,[78] and many consider it a rival to the dominant state press. Indeed, its circulation figures peaked at 200,000 in 2011[79] since its first issue in 2004,[80,81] but these figures are generally in decline. This drop is partially due to expanding competition.

Until 2004, when the first license for a privately owned Egyptian daily for *Al Masry Al Youm* was issued, private sector aspirations exploited narrow leeway to get their newspapers in print. Privately owned Egyptian newspapers licensed their titles abroad, but operated within Egypt. Among the first newspapers to acquire an offshore private license was *Al Alam Al Youm*, founded in 1991 and headquartered in London.[82] Printing business and financial news, the newspaper gained popularity with Egypt's business community. Good News Group, a media and entertainment company, owns *Al Alam Al Youm*.[83]

Following the same model, *Al Dostour* was founded in 1995 and registered its permission to publish in Cyprus.[84] It began to locally print and distribute its newspaper using government facilities.[85] *Al Dostour* began as a weekly paper and later became a daily. In 1998, circulation for the paper was estimated at 50,000.[86] In the same year, due to an article on Islamist groups, the government closed down the paper under accusations of inciting sectarian controversy in Egypt.[87] In 2005, it acquired an Egyptian license for the first time to resume its weekly publication[88] and went daily in 2007.[89] In 2010, prior to the parliamentary elections, *Al Dostour* was acquired from the original founder by *Al Wafd's* Badawi and Reda Edward for LE16 p. 891 million (US$3.2 million).[90] This deal was done within Badawi's efforts to expand his investments to ↳

p. 892 ↳ include media in print and television (Al Hayat TV Satellite channel).[91] Much to the dismay of the public, Badawi expelled *Al Dostour's* editor-in-chief, Ibrahim Eissa, a famous Egyptian journalist who was popular for his criticism of the Mubarak regime and *Al Dostour's* editorial team.[92] In 2011, Al Dostour ranked fifth in circulation of daily newspapers.[93]

Conclusion

The newspaper industry in Egypt has historically been under a host of direct and indirect controls by the government. Since 2004, the entry of powerful businessmen to the scene has meant that business interests have also come to influence print media, albeit in different forms than government censorship. As ownership diversity increased, concentration figures declined in the industry. The appropriation of significant market share for new entrants is reflected in the HHI's steep fall starting in 2004. Although the market is still constrained by a number of economic barriers and political agendas, a greater number of voices in the market and a positive step toward media plurality are reflected in the gap between the HHI and the Noam Index (see Table 29.1 and Graph 29.1). In general, the expansion and diversity of print media ownership are positive from an access to knowledge perspective, despite the fact that structural impediments, political and economic, continue to limit the ability to start a newsprint operation.

Table 29-1. Daily Newspaper Concentration

Daily Newspapers					
Market Shares by Readership (%)	**2002 and 2003**	**2004 and 2005**	**2006 and 2007**	**2008 and 2009**	**2010**
Al Ahram (Public)	42.0	38.3	38.5	29.4	28.7
Al Akhbar (Public)	30.2	36.1	31.7	28.9	23.5
Al Gomhouriya (Public)	21.8	20.1	21.5	21.6	20.0
Al Wafd (Private/Partisan, Egypt)	3.9	3.6	2.8	2.4	1.9
Al Ahrar (Private/Partisan, Egypt)	0.6	0.5	0.7	0.7	0.7
Al Masry Al Youm (Private/Independent, Egypt)	N/A	0.5	3.5	8.1	15.4
Al Dostoor (Private, Egypt)	N/A	N/A	N/A	3.8	5.2
Al Alam Al Youm	0.0	0.2	0.2	0.3	0.1
Other	1.4	0.6	1.1	4.8	4.6
Revenue Estimates (mil $)		123.0		148.0	
C4	97.9	98.1	95.2	88.0	87.6
HHI	3,168	3,188	2,972	2,278	2,065
Number of Players (*n* with % >1%)	4	4	5	6	6
Noam Index	1,584	1,594	1,329	930	843

Source: PARC Newspaper Readership Study 2002–2010 (we bought the study results).

Note: The Noam index only includes all voices that have a market share larger than 1%.

Note 2: N/A means not applicable because the company had not started up yet.

Note 3: Revenue estimates are for the years 2004 and 2008.

Graph 29.1

Daily Newspaper Concentration

Daily Newspaper Concentration

Print Media

Newspapers

Infrastructure and Regulation

The constitution in Egypt allows newspapers to be owned by public or private legal entities and political parties.[30] The press functions under the auspices of the Ministry of Information,[31] where print media operates under the Press Authority Law no. 96 of 1996 and the Publications Law no. 20 of 1936. In compliance with these laws, a publishing license can only be obtained through notification to the Supreme Press Council,[32] subject to the latter's discretion to refuse publishing. Newspapers can only be licensed in the form of joint-stock companies after incurring substantial minimum capitalization fees.[33] Press legislation limits ownership by a single individual to a maximum of a 10% share in any newspaper.[34] However, this law was applied unevenly and those who wished to circumvent it simply appropriated shares to their families and relatives.[35]

Generally, the Supreme Press Council is regarded as the main vehicle for government influence in the sector. It is important to note that the Shura Council (the upper house of parliament) legally owns national press outlets.[36] In commonly fraudulent elections prior to the revolution on January 25, 2011, the formerly ruling National Democratic Party used to win majority seats in the Shura Council. The head of the Shura Council has also been the de facto head of the Supreme Press Council, thereby exposing the latter to significant government control at a time when election results were highly controlled by the ruling regime.[37] Moreover, the Supreme Press Council retains the executive rights to issue licenses to private newspapers.[38] It is yet to be seen how this process will be affected by the 2014 Constitution which rules the setting up of newspaper only by notification and not by authorization.[39]

In order to circumvent opaque licensing criteria, expensive start-up costs, and restrictions on content, over 200 Egyptian-owned publications (including newspapers) registered their titles abroad[40] in countries such as p. 888 ↳ Cyprus. However, these publications printed their publications locally.[41] Shortly after, a new bureau was established at the Ministry of Information called "censorship on foreign publications" to block this loophole created by independent publishers. The justification for creating this bureau was to protect national security and the morality of the state from foreign conspiracies. In 2001, most licenses were revoked in Cyprus since most publishers did not pay taxes, nor submit annual legal paperwork there. Very few investors now resort to foreign licenses.[42] More private ventures around print media with local licenses emerged after *Al Masry Al Youm* daily was established in 2003, supported by the capital of powerful businessmen.

State-run distribution firms distribute all privately owned newspapers, including independent or partisan titles. *Al Ahram* and *Al Akhbar* are the largest two printing and distribution houses in Egypt. *Al Ahram* has an estimated 7,500 distribution points within the nation.[43] Given the private sector's point of view, securing a large fleet that can cater to Egypt's national needs[44] could result in higher costs as the sheer size of *Al Ahram* allows it to benefit from economies of scale in distribution.[45] A distribution arm may be set up at the rough cost of LE12 million (US$2 million), half of which would cover equipment and vehicles. The rest would cover operational costs. Private media operations have not shown interest in investing in this activity.[46]

The state also monopolizes the print industry for newspapers and newsprint.[47] With the exception of *Al Masry Al Youm*, Egyptian newspapers use state-owned print houses for both printing and distribution.[48] The government uses this monopoly in printing and distribution to influence market competition, and as a vehicle for censorship because newspapers' printing and distribution could be delayed if the content is deemed controversial.[49]

Ownership

The government owns controlling stakes in *Al Ahram* (established in 1875),[50] *Al Akhbar* (established in 1952),[51] and *Al Gomhouriya* (established in 1953).[52] As national press organizations, the law sets ownership dynamics whereby the Shura Council holds 51% of establishment capital and affiliates, with the remaining 49% held by the establishment employees. Accordingly, 50% of the net profits are to be allocated to establishment employees, while the other 50% is to be allocated for "expansion and renovation projects."[53] Indeed, Article 22 of the Law on Press Authority states, "National press establishments shall be considered the property of the state and the Shura Council shall exercise ownership rights over national press establishments."[54] Furthermore, past editors-in-chief p. 889 ↳ of all three papers have been appointees by the president[55] and were commonly selected from members of the formerly ruling National Democratic Party.[56] Since these newspapers have been run by a succession of sycophantic managers who steered clear of red lines surrounding political criticism, this administrational appointment system provided for self-censorship.[57] After the revolution on January 25, 2011, the Shura Council set a series of guidelines for the positions of editors-in-chief, while it opened a nomination door for candidates.

Al Ahram is a giant in Egypt's print industry. Apart from issuing its daily newspaper, its flagship product, the company is the largest printing, publishing, and distribution house in Egypt.[58] *Al Ahram* officially quotes its daily circulation at an estimated 750,000 in 2009, claiming approximately 80% of daily newspaper circulation in Egypt and declaring itself one of the most widely circulated in the Arab world.[59, 60] This is a political overstatement and comes in sharp contrast to available statistics. Our own estimate of the market share of *Al Ahram* in 2009 is 29%.[61] *Al Ahram* issues other publications and magazines.[62] According to the officially quoted figures and available statistics in 2011, *Al Akhbar* ranked second in the market and *Al Gomhouria* third,[63] both of which follow the same structure and operate in the same industries as *Al Ahram*, but on a relatively smaller scale.[64]

An alternative voice to the national press existed in the form of partisan newspapers, funded by the individual parties[65] and government subsidies.[66] The press law allowed political parties to establish their own papers that were generally referred to as opposition papers.[67] Due to their reliance on government printing facilities and subsidies, as well as their need for government approval to legally establish a political party, news coverage by partisan papers tends to adopt a cautious attitude toward political criticism.[68] Moreover, often co-opted party leaders themselves assume the papers' editorial.[69] An example is *Al Wafd*, established in 1984 by the economically and politically liberal *Wafd* Party,[70] and managed by the chairman of the Wafd Party, Al-Sayyid Al-Badawi.[71] Of all partisan newspapers, *Al Wafd* enjoyed the largest circulation,[72] estimated at 60,000 in 2003.[73]

p. 890 The first private Egyptian-owned newspaper to be registered locally was *Al Masry Al Youm. Al Masry Al Youm* was founded in 2003[74] by Salah Diab, a prominent member of *Al Wafd Party*.[75] Controlling stakes in the paper are held by a group of businessmen including Diab, Ahmed Bahgat (owner of satellite channel Dream TV), and Naguib Sawiris (owner of majority stakes in Orascom Telecom).[76] It is the only newspaper in Egypt with its own independent print firm.[77] *Al Masry Al Youm* enjoys the highest circulation figures among privately owned newspapers,[78] and many consider it a rival to the dominant state press. Indeed, its circulation figures peaked at 200,000 in 2011[79] since its first issue in 2004,[80, 81] but these figures are generally in decline. This drop is partially due to expanding competition.

Until 2004, when the first license for a privately owned Egyptian daily for *Al Masry Al Youm* was issued, private sector aspirations exploited narrow leeway to get their newspapers in print. Privately owned Egyptian newspapers licensed their titles abroad, but operated within Egypt. Among the first newspapers to acquire an offshore private license was *Al Alam Al Youm*, founded in 1991 and headquartered in London.[82] Printing business and financial news, the newspaper gained popularity with Egypt's business community. Good News Group, a media and entertainment company, owns *Al Alam Al Youm*.[83]

Following the same model, *Al Dostour* was founded in 1995 and registered its permission to publish in Cyprus.[84] It began to locally print and distribute its newspaper using government facilities.[85] *Al Dostour* began as a weekly paper and later became a daily. In 1998, circulation for the paper was estimated at 50,000.[86] In the same year, due to an article on Islamist groups, the government closed down the paper under accusations of inciting sectarian controversy in Egypt.[87] In 2005, it acquired an Egyptian license for the first time to resume its weekly publication[88] and went daily in 2007.[89] In 2010, prior to the parliamentary elections, *Al Dostour* was acquired from the original founder by *Al Wafd's* Badawi and Reda Edward for LE16
p. 891 million (US$3.2 million).[90] This deal was done within Badawi's efforts to expand his investments to ↳

p. 892 ↳

include media in print and television (Al Hayat TV Satellite channel).[91] Much to the dismay of the public, Badawi expelled *Al Dostour's* editor-in-chief, Ibrahim Eissa, a famous Egyptian journalist who was popular for his criticism of the Mubarak regime and *Al Dostour's* editorial team.[92] In 2011, Al Dostour ranked fifth in circulation of daily newspapers.[93]

Conclusion

The newspaper industry in Egypt has historically been under a host of direct and indirect controls by the government. Since 2004, the entry of powerful businessmen to the scene has meant that business interests have also come to influence print media, albeit in different forms than government censorship. As ownership diversity increased, concentration figures declined in the industry. The appropriation of significant market share for new entrants is reflected in the HHI's steep fall starting in 2004. Although the market is still constrained by a number of economic barriers and political agendas, a greater number of voices in the market and a positive step toward media plurality are reflected in the gap between the HHI and the Noam Index (see Table 29.1 and Graph 29.1). In general, the expansion and diversity of print media ownership are positive from an access to knowledge perspective, despite the fact that structural impediments, political and economic, continue to limit the ability to start a newsprint operation.

Table 29-1. Daily Newspaper Concentration

Daily Newspapers					
Market Shares by Readership (%)	**2002 and 2003**	**2004 and 2005**	**2006 and 2007**	**2008 and 2009**	**2010**
Al Ahram (Public)	42.0	38.3	38.5	29.4	28.7
Al Akhbar (Public)	30.2	36.1	31.7	28.9	23.5
Al Gomhouriya (Public)	21.8	20.1	21.5	21.6	20.0
Al Wafd (Private/Partisan, Egypt)	3.9	3.6	2.8	2.4	1.9
Al Ahrar (Private/Partisan, Egypt)	0.6	0.5	0.7	0.7	0.7
Al Masry Al Youm (Private/Independent, Egypt)	N/A	0.5	3.5	8.1	15.4
Al Dostoor (Private, Egypt)	N/A	N/A	N/A	3.8	5.2
Al Alam Al Youm	0.0	0.2	0.2	0.3	0.1
Other	1.4	0.6	1.1	4.8	4.6
Revenue Estimates (mil $)		123.0		148.0	
C4	97.9	98.1	95.2	88.0	87.6
HHI	3,168	3,188	2,972	2,278	2,065
Number of Players (*n* with % >1%)	4	4	5	6	6
Noam Index	1,584	1,594	1,329	930	843

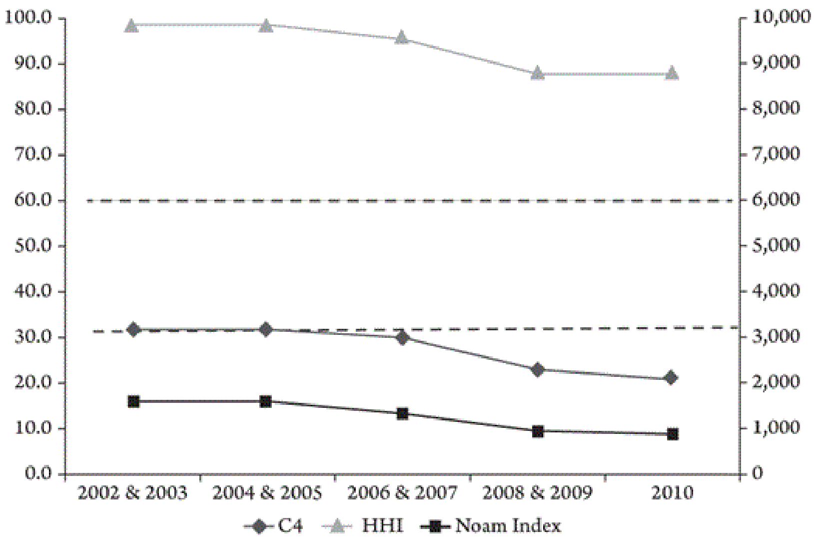
Source: PARC Newspaper Readership Study 2002–2010 (we bought the study results).

Note: The Noam index only includes all voices that have a market share larger than 1%.

Note 2: N/A means not applicable because the company had not started up yet.

Note 3: Revenue estimates are for the years 2004 and 2008.

Graph 29.1



Daily Newspaper Concentration

Audiovisual Media

Television is Egypt's most popular mass medium: 90% of Egyptians own a television set and 70% own a satellite receiver.[94] Radio ranks ↳ second with approximately 80% of households in 2007 owning a radio set.[95] The high level of exposure offered by audiovisual media gives it strategic political importance. Subsequently, it attracts acute interest from the ruling regime.

Until 2012, Egypt's authorities kept an iron grip over audiovisual media, including television, radio, and satellite TV. Control is maintained in three ways: regulatory measures, maintenance of a monopoly over the industry or industry infrastructure, and informal censorship. The latter is practiced by tacitly ensuring that key players and gatekeepers in privately owned outlets are political allies to the ruling regime.

Thus far, the state has retained full discretion over the granting of licenses to media corporations. These licenses are issued without a clear set of rules or procedures and in "a highly selective manner."[96] On the ownership side, the Egyptian government owns major mediaplayers in order to directly compete in the market. Additionally, it monopolizes the infrastructural backbone for media corporations to limit competition to an approved set of players. Although subject to state influence, Egypt has witnessed unprecedented successful private initiatives in the post-millennium era and particularly after the revolution of January 25, 2011.

Radio

Radio is the second most popular form of media in Egypt.[97] Due to its strategic political importance, the radio industry in Egypt is almost completely dominated by the government through the state-run Egyptian Radio and Television Union (ERTU) (Graph 29.2). ERTU has remained a monopoly, with very limited participation from international companies' Arabized ↳ stations, including BBC Arabic radio service, Voice of America Arabic service, and Monte Carlo Arabic service. In 2003, Nile Radio Productions was the first private Egyptian company to enter the radio market.

Graph 29.2

Radio Concentration

Radio Concentration

In 1981, ERTU's radio networks were divided into seven divisions according to content, ranging from commercial to religious (Qur'an), educational, and cultural stations. The local radio network expanded to cover local cities and administrative districts including Alexandria, Upper Egypt, Sinai, and overseas.[98] Qur'an channel has the largest audience and accounts for the greatest part of ERTU's radio market share.[99]

Nile Radio Productions (NRP) was established in 2003 and consists of two music stations: Nile FM broadcasts in English and Nogoom FM broadcasts in Arabic. Good News Group, an entertainment and media conglomerate in the Middle East and North Africa, owns a 25% stake in NRP.[100] In contrast to ERTU's archaic content that includes outdated music and radio presenters broadcasting in classic Arabic, these two stations provide current pop culture entertainment. Meanwhile, NRP was prohibited by the government to air any newscasts; content was restricted to entertainment only.[101] Even though NRP's coverage is geographically limited to Cairo, its modern content and savvy advertising explain why it gained ground quickly. Its success is evident in the sharp dip in HHI and NI in 2003 (see Table 29.2). Its recent web launch helped it reach listeners in Alexandria, Egypt's second largest urban city, and also earned it an expatriate and international audience abroad. Amr Adeeb, managing director of NRP, head of the entertainment division at the Good News Group, reported advertising revenues in the first year of operation to be a record-breaking $3.2 million.[102]

Table 29-2. Radio Concentration

Radio							
Market Shares by Listenership (%)	**2001**	**2002**	**2003 and 2004**	**2005 and 2006**	**2007**	**2008 and 2009**	**2010**
Egyptian Radio and Television Union (ERTU) (public)	96.6	95.2	82.2	85.1	84.1	88.0	85.4
Nile Radio Productions (NRP) (Local, Private)	N/A	N/A	12.7	11.7	13.0	10.0	10.4
Eza'at Masr	N/A	N/A	N/A	N/A	N/A	N/A	2.2
BBC (UK)	1.3	0.6	1.0	0.6	0.5	0.3	0.2
Monte Carlo (France)	1.3	1.0	0.7	0.5	0.1	0.1	0.1
Voice of America (US)	0.4	2.6	3.0	1.8	1.8	1.1	1.3
Radio France (France)	N/A	0.0	0.0	0.0	0.0	0.0	0.0
Deutsche Welle (DW) (Germany)	N/A	N/A	N/A	N/A	N/A	N/A	0.0
Others	0.4	0.6	0.4	0.3	0.4	0.4	0.4
Revenue Estimates (mil $)			13.0			39.0	
C4	99.6	99.4	98.9	99.2	99.4	99.4	99.3
HHI	9,335	9,071	6,929	7,383	7,245	7,845	7,408
Number of players (*n*)	3	3	4	3	3	3	4
Noam Index	5,390	5,237	3,464	4,262	4,183	4,530	3,704

Source: PARC Radio Reach survey 2001–2010.

Note: For the years 2003–2006, the sampling was conducted over a two-year period and so values represent two years' work.

N/A: No data available.

Emad Eddin Adeeb, the owner, was close to the Mubarak regime, and this is believed to have aided him in investing in a private radio venture.[103] In fact, after the launch of the private radio channels, the newspaper *Al Alam Al Youm* provided positive commentary on Mubarak's pledge to run the first multi-candidate elections in 2005. Moreover, the general manager of the radio channels, Amr Adeeb, provided critical commentary on the president's opponents in his nightly talk show broadcasted via satellite.[104]

NRP was a game changer because it commercialized the long neglected radio market in Egypt. In response to NRP's emergence as a new player, ERTU altered its content strategy and in 2009 established its own media agency, *Sawt Al Qahira* (Voice of Egypt), responsible for commercializing ERTU's media activities.[105] In the same year, ERTU launched the Egyptian Radio Network (ERN) with four new FM stations with nationwide coverage,[106] including Radio Misr in 2009,[107] a private–public radio station, with presenters broadcasting in Egyptian dialect and providing news bulletins interspersed between contemporary music.[108] Many are detecting the changing nature of Radio Misr's content, which became more politicized in the aftermath of the January 25 revolution when politics became an inevitable topic for conversation in all media outlets. ↵

p. 896 Many groups flirting with the idea of setting up a radio station have kicked off online channels, which also shows the difficulty of appropriating the airwaves. In turn, the government's Draft Broadcast Law in 2008 included "computer networks" and "digital media" in its scope of audiovisual content to bring these outlets into the legal constraints placed on other media outlets.[109]

Broadcast Television (Over-the-Air)

Broadcast television is the monopoly of the Ministry of Information, which owns and manages state television and radio through the ERTU.[110] State monopoly over audiovisual terrestrial broadcasts through the ERTU is legally granted by Law no. 13 of 1979, and its amendment by Law no. 223 of 1989.[111] By 2008, new laws officially suspended the state's monopoly by allowing for the allocation of terrestrial broadcast licensing[112] but maintained restrictions on broadcasting content.[113] Although hopeful entrepreneurs are in line applying for these terrestrial licenses, by spring 2013 none had been issued (Graph 29.3).[114]

Graph 29.3

Broadcast TV Concentration

Broadcast TV Concentration

ERTU reports to the Ministry of Information,[115] who in turn delivers "political 'guidance' on an annual basis."[116] It dominates the audiovisual market, owning Egyptian Television Network (ETN), the only terrestrial broadcaster, which includes eight local channels. Owned and run by the state since its establishment in 1960,[117] terrestrial television has been a mouthpiece for each governing regime. Anger and discontent with the state media's biased coverage of key events has made the Maspero building, which houses the ERTU, a site for major protests since the January 25 revolution.

ERTU also owns a major stake in Nile Television Network (NTN), a main satellite and channel provider in the Arab world. It owns 50% of Egyptian Media Production City (EMPC), established in 2000[118] as a main provider of equipment, studios, and technical support for audiovisual media content. It benefits from tax exemptions and other legal incentives,[119] thus attracting private players to license Egyptian-owned satellite channels.

ERTU also owns a 40% stake in the joint stock company Nilesat, the only provider of satellite broadcasting services in Egypt and a major provider to the Arab World, airing more than 600 channels, 76% of which are free (Table 29.3).[120] These include Egyptian TV (ETV), which sells its specially produced programs and soap
p. 897 operas to the Arab World, Nile TV, Nile News, and seven other specialized channels.[121] ↳

Table 29-3. Broadcast TV Concentration

TV Broadcasting								
Market Shares by Viewership (%)	**1984**	**1988**	**1992**	**1996**	**2000**	**2003 and 2004**	**2008 and 2009**	**2010**
Egyptian Radio and Television Union (ERTU) (Public)	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Revenue Estimates (mil $)						162.0	243.0	
C1	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
HHI	10,000	10,000	10,000	10,000	10,000	10,000	10,000	10,000
Noam Index	10,000	10,000	10,000	10,000	10,000	10,000	10,000	10,000
Number of players (*n*)	1	1	1	1	1	1	1	1

Source: ERTU is the only company allowed to broadcast terrestrial television.

Note: Revenue estimates are for the years 2004 and 2008 based on the figures in other developing countries in this project provided by the editor.

p. 898 The launch of the first private satellite channels, Dream TV in 2001 and Mehwar in 2002,[122] was "a face-saving procedure" in response to growing political pressures on state-led liberalization.[123] Egyptian state television—both terrestrial and satellite—has been exposed to competition by private satellite broadcasters in entertainment media. However, Decree 411 of 2000 placed restrictions on broadcast content and genre.[124] Since private broadcasters are not permitted to supply their own newscasts,[125] limited competition ensures that the government maintains a tight grasp on political censorship. Even though ERTU owns a share in both Dream TV and Mehwar, neither of these channels air newscasts.[126] To circumvent restrictions on news content, private channels produced talk shows with cautious commentary on issues in the news. This became the only permissible form of political expression. Nevertheless, these talk shows gained popularity and professional television journalism offered an alternative news narrative to that of ERTU. This was especially true of the coverage of the January 25 revolution and the ensuing events.

p. 899 Multichannel TV Platforms

While cable television was introduced in other parts of the world in the 1970s and 1980s, this was not the case in Egypt because it was not a priority for the state at that time.[127]

In 1990, ERTU, along with private shareholders, received approval from the government to establish Cable News Egypt (CNE) as "the first Pay-TV project in the Arab world."[128] While carrying the "cable" title, CNE did not use cable technology, but actually used terrestrial broadcasting technology for "rebroadcasting."[129] CNE was established within a cooperative agreement with CNN for 25 years, with the main purpose of retransmitting CNN International in Egypt. The chair of ERTU also chaired CNE. Additionally, ERTU retained control over "CNE's ultra high frequency channel (UHF)."[130]

Later in the 1990s, Egypt "bypassed cable straight into satellite television."[131] Three main multichannel platform providers cater to Egypt and the Arab region with a combined bundle of channels: Arab Radio Television (ART), Orbit, and Showtime Arabia, established in 1993, 1994, and 1996, respectively (Graph 29.4).[132] ART was founded by Saudi Arabia's Sheikh Saleh Kamel through his Arab Digital Distribution Company (ADD) and is based in the United Arab Emirates.[133,134] Apart from operations in the Middle East and North Africa, ADD owns Pehla, another satellite platform in Asia,[135] and Firstnet, which broadcasts to Europe and the Americas.[136] Kamel is also a partner in the prominent channel provider, the Middle East Broadcasting Center (MBC),[137] and ART also owns major film production studios in the region.[138]

Graph 29.4

Multichannel Platform Concentration

Multichannel Platform Concentration

The Orbit network is a subsidiary of the Saudi investment company, Mawarid Group.[139] Mawarid Group also owns subsidiaries in telecommunications, satellite television, and radio networks.[140] The Orbit network targets its content toward a more affluent customer profile and was based in Rome until 2005, when it moved to Bahrain.[141] Showtime Arabia is the only one of three pay-TV networks that is not Saudi-owned. The Kuwait Company Projects Holding (KIPCO) owns controlling shares in Showtime Arabia, and the
p. 900 remaining 21% is owned by the CBS Corporation.[142] Showtime and Orbit ↳ merged in 2009.[143] This merger came under the Panther Media Group; a company registered in the Dubai International Financial Center and is jointly owned by KIPCO and the Orbit Group.[144]

Table 29.4 only addresses the pay-TV market for platform providers for which data were available. It is worth noting that pay-TV has captured a minimal share of the satellite market. Estimates reveal that only 4% of the total population in 2009 subscribed to a network.[145] In 2005, Booz and Co (previously Booz and Allen) confirmed these figures in a study that reported only 1 million subscribers in the Arab region for the three main platform providers: ART, Orbit, and Showtime.[146] Pay networks are in direct competition with free-to-air satellite, including state-owned Nilesat,[147] Saudi Sheikh Walid Al Ibrahim's MBC,[148] the international Lebanese Broadcasting Corporation (LBC) based in the Cayman Islands,[149] and Dubai Media Incorporated (DMI), which is partly owned by ART's Kamel and the government.[150]

Table 29-4. Multichannel Video Platform Concentration

Multichannel Platforms (Cable, Satellite)				
Market Shares by Viewership (%)	**2005**	**2006**	**2007 and 2008**	**2009**
ART (Saudi)	69.50	80.10	88.10	91.50
Orbit (Mawarid Group, Saudi Arabia*)	20.67	9.30	7.07	6.86
Showtime (KIPCO Kuwait 79%, CBS USA 21%)	9.83	10.58	4.84	1.62
Star Select				
Revenue Estimates (mil $)	75.0		164.0	
C4	100.0	100.0	100.0	100.0
HHI	5,354	6,614	7,835	8,422
Noam Index	3,091	3,819	4,524	4,862
Number of players (*n*)	3	3	3	3

Source: PARC PayTV Reports 2005–2009.

* Orbit and Showtime merged in July 2009. Data for this year refer to each company separately.

Additionally, pay-TV network subscriptions are hampered by receivers that use sharing servers to illegally decode transmissions by pay-TV platforms. These decoders offer the same array of channels with no subscription fees. Hence, Egyptians could view the same content as pay-TV platform subscribers with only an investment in a receiver and DSL connection. To combat illegal viewing in December 2010, the Orbit Showtime Network successfully distributed set-top boxes that use a conditional access system (CAS) to all its subscribers. These boxes bar unofficial reception of its channels by other receivers. The network has also lobbied the government to enforce new regulatory measures that would cease illegal viewership.[151]

p. 901

Video Channels

Satellite channels have brought a regional dimension to the market and eliminated redundant local media.[152] Table 29.5 and Graph 29.5 for video channel providers illustrate one of the lowest HHI levels across the spectrum of industries studied in this chapter. Egypt has traditionally been a pioneer for entertainment media.[153] Although figures reveal that the industry remains concentrated, ownership shows substantial participation from regional players, most notably Gulf States. Within the last decade, oil-rich Arab states with ample investment power have imported Egyptian ownership and regulation policies. Initially, this allowed Egyptian professionals to program content and create their own competing entertainment industry.[154] Today, with two of the largest media empires owned by Saudi Arabia, the country has become a major contender in satellite airwaves with free-to-air television. This includes Western channels such as Newscorp's Fox International that have been dubbed for Arab viewers.

Table 29-5. Video Channel Concentration

Video Channels							
Market Shares based on viewership (%) ERTU (Public)	**2001**	**2002**	**2003 and 2004**	**2005 and 2006**	**2007**	**2008 and 2009**	**2010**
ERTU (Public)							
Egypt Satellite Channel (ESC) (Public)	6.6	7.4	10.9	3.0	2.0	2.1	1.8
NTN (Public)	53.8	40.0	23.0	16.7	18.3	14.7	10.0
Al Jazeera (Qatar Government)	8.7	6.4	6.2	6.3	5.6	3.8	2.1
MBC (Saudi Arabia)	4.7	3.2	10.3	11.9	12.7	11.3	9.2
Future TV Network (Private, Lebanon)	1.8	1.4	1.1	0.2	0.2	0.2	0.0
ART (Saudi Arabia)	1.1	6.0	7.1	7.5	2.0	2.4	1.4
DMI (Public, Dubai)	6.2	3.2	3.5	2.8	2.3	1.7	0.3
BBC (Pubic, UK)	0.4	0.4	0.1	0.0	0.0	0.1	0.0
CNN (Time Warner, USA)	3.3	1.0	0.1	0.0	0.0	0.1	0.0
Dream TV Network (Private)	N/A	17.4	15.7	12.3	13.3	9.8	6.4
Al Mehwar (83% private, 17% public)	N/A	4.4	4.7	3.4	4.3	4.9	4.2
Melody Entertainment Holding (Private)	N/A	1.6	2.7	4.0	2.3	6.2	5.7
Saudi TV (Saudi Arabia)	N/A	0.8	0.4	0.1	0.1	0.1	0.1
Rotana (Private, Saudi Arabia)	N/A	N/A	4.1	21.7	20.4	15.4	9.7
LBC (merged with Rotana in 2007)	4.7	3.2	2.7	0.6		N/A	N/A
Mazzika (Private)	N/A	N/A	4.4	2.3	1.8	1.2	1.1
Al Majd TV (Private, Saudi Arabia)	N/A	N/A	0.3	5.0	2.7	0.9	2.4
Spacetoon (Private, Headquarters in Dubai)	N/A	N/A	0.6	0.3	0.3	0.4	0.1
Al Rai TV (Private, Kuwait)	N/A	N/A	N/A	0.2	0.0	0.1	0.1
OTV (Private)	N/A	N/A	N/A	N/A	0.1	0.3	0.3
Hayat (Private)	N/A	N/A	N/A	N/A	0.0	2.1	13.3
Al Baraheen International (Saudi Arabia)	N/A	N/A	N/A	N/A	9.5	9.6	6.1
Modern TV	N/A	N/A	N/A	N/A	N/A	2.0	3.9
Panorama	N/A	N/A	N/A	N/A	N/A	7.0	12.2
Al Rahma TV (Private, Sheikh Saleh)	N/A	N/A	N/A	N/A	N/A	N/A	2.9
Moga Comedy (Private)	N/A	N/A	N/A	N/A	N/A	N/A	3.0
Others	8.7	3.6	2.26	1.8	2.1	3.8	4.0
Revenue Estimates (mil $)			333.0			510.0	
C4	75.3	71.2	59.8	62.6	64.6	51.2	45.2
HHI	3,114	2,090	1,172	1,214	1,256	919	782
Number of Players (*n*)	9	12	13	12	13	15	17
Noam Index	1,038	603	325	351	348	237	190

Source: PARC Household Viewership Survey 2001–2010.

N/A: Data not available.

Graph 29.5

Video Channel Concentration

Video Channel Concentration

Infrastructure and Regulation

The Arab Satellite and Communications Organization (Arabsat), headquartered in Riyadh, Saudi Arabia, was established in 1976. Jointly owned by the Arab League of Nations, Arabsat shares are concentrated in the
p. 902 hands of oil-rich nations including Saudi Arabia, Kuwait, ↳

p. 903 ↳

p. 904 ↳

Libya, and Qatar, which ranked as the four top shareholders.[155]

The second satellite company in the region is Egypt's Nilesat, partly owned by the Egyptian government through its media vehicle, ERTU.[156] Egypt first notified the International Telecommunications Union of its intention to obtain an orbital slot after being expelled from the Arab League, and consequently Arabsat, in 1979 because of its peace treaty with Israel. However, its allocation was not assigned until 1995.[157] With one satellite headquartered in Saudi Arabia and the other in Egypt, both countries were able to launch rival attempts at controlling regional satellite broadcasting.[158] A legal case unfolded after SCAF announced in September 2011 that it would ban the issuing of new satellite licenses. Saudi Arabia announced the transfer of all of its channels from Nilesat to Arabsat, a tactical move that caused the Egyptian television industry to sustain losses.[159]

While these satellites have allowed for transnational television to proliferate, the country that owns the satellite platform also controls content. For example, news sources revealed that Nilesat suspended Al Jazeera's signal on January 30, 2011, during the toppled regime's battle to survive the revolutionary ascent of 2011.[160] Moreover, self-censorship imposed by nations broadcasting on Nilesat and Arabsat exposed transnational television to a level of state-control similar to local terrestrial channels.[161]

In Egypt, the Ministry of Information is responsible for licensing satellite channels and requires already
p. 905 existing satellite channels to acquire permission for live coverage of events ↳ and the distribution of news to other channels.[162] Despite this, there is no specialized regulatory body governing the broadcast market.[163] New channels wishing to start up in Egypt had to abide by a minimum capitalization of US$4.5 million and vow to maintain the same genre of content.[164] Decree 411 of 2000 is concerned with television licensing and restricts companies from broadcasting content of their choice, especially with regard to news content.[165]

Ownership

ERTU was the first company to use Arabsat by launching the Egyptian Space Channel (ESC) in December 1990.[166] The ESC became so popular that Kuwaiti and Bahraini governments arranged to distribute the channel nationally through terrestrial networks.[167] Also owned by ERTU,[168] NTN started in 1993 under the name Nile TV International.[169] It offers nine specialized channels, all of which became free-to-air as of 2005.[170]

Privately owned Dream TV, Egypt's first satellite contender, launched in 2001 with start-up capital of US$5 million,[171] a miniscule figure relative to Gulf-financed channel providers. *Al Mehwar* followed Dream TV as the second private satellite channel and launched in early 2002. Well-known businessmen own 83% of the channel. The government owns the remaining 17% through ERTU, EMPC, and Nilesat.[172] While the content aired on both channels is theoretically considered "editorially independent,"[173] both channels are restricted from broadcasting news despite ERTU's ownership stake in these private companies.[174]

The launch of the first private channels, owned largely by business moguls with close ties to Mubarak's regime, initiated a trend in Egypt where businessmen have shown a vested interest in the power of media. This also includes *Al Hayat* Channel, owned by Badawi,[175] and Sawiris' ONTV. After the revolution of January

p. 906 25, 2011, additional channels have acquired licenses[176] and are run by business magnates[177] ↳ such as Mohammed Al Amin's CBC.[178] Amin also owns considerable shares in *Al Nahar* satellite channel, *Al Youm Al Sabae* newspaper,[179] and *Al Watan* daily.

In the regional landscape, the early 1990s saw a boost from Saudi-owned satellite channels including MBC and ART.[180] MBC was first launched in 1991 from London, and has been headquartered in Dubai Media City[181] since 2002. MBC is a market leader among Arab media conglomerates with strong viewership in the Pan-Arab region. MBC owns 10 television stations in addition to two radio stations, online interfaces, and documentary producers.[182]

Saudi control of the market is furthered by Rotana Group, which is considered one of the largest media companies in the region. Owned by Al Walid Bin Talal and part of the Kingdom Holding Company,[183] Rotana brings strong representation from the Gulf across a number of entertainment media outlets. News sources in early 2010 announced plans from management to list Rotana on the London and Dubai stock exchange with reported valuations for Rotana Group amounting to just over US$770 million.[184] Rotana's satellite division hosts 11 channels featuring music and film entertainment. A new general entertainment channel targeted specifically at the Egyptian market[185] has recently been announced. Apart from satellite television, Rotana owns the largest record label in the Arab World,[186] prints its own magazine, and is a major distributor of Arabic movies, with a library exceeding 1,600 films.[187]

As early as 2003, when Prince Talal fully acquired Rotana,[188] it became clear that his strategy was to work toward consolidating a media empire. That same year he reduced his previous stake in ART to 5% in addition to creating the Rotana music channel, based on ART's previously existing music channel.[189] Prince Talal increased his stake in LBC to 85% in July 2008, and merged it with Rotana.[190] LBC was already a conglomerate in its own right, privately owned by Lebanese businessmen. Rotana's cross-ownership in the Arab world also extends to global partners. Talal owns a 7% stake in News Corp[191] and conversely, Rupert Murdoch has come to own a 9% stake in Rotana as of 2010.[192] This partnership between two burgeoning media empires is expected to grow as News Corp has the option to extend its stake in Rotana. Talal also

p. 907 owns sizeable shares in Time Warner and Euro Disney.[193] Rotana's ↳ merger with LBC and expansion into other media forms is often considered part of a strategy designed to take on MBC.[194]

Another important player is Al Jazeera. Owned and financed by the government of Qatar, Al Jazeera Satellite Channel (JSC) was launched in November 1996 as the first Arab channel to offer 24-hour news.[195] In 2006, with a US$150 million grant from the Emir of Qatar,[196] Al Jazeera International was deployed, earning it attention from Western audiences.[197] After Mubarak stepped down in February 2011,[198] Al Jazeera Mubasher Misr was launched without a license to cover live events in Egypt. It was shut down in September 2011.[199] Al Jazeera has been the site of tensions with the Egyptian and Saudi regimes, exemplifying regional media battles. After ousting his father in 1995, the new Crown Prince of Qatar, Sheikh Hamad Bin Khalifa Al Thani, developed a rift with Saudi Arabia and Egypt. Initially, Al Jazeera attacked Egypt and Saudi Arabia because of their negative newspaper coverage of this bloodless coup and because they housed the former Qatari regime's supporters.[200] Owned by the Emir himself, Al Jazeera quickly earned a reputation for uncensored criticism of Egyptian and Saudi rule.

The market has included other regional conglomerates. For example, Future Television Network is a private Lebanese channel founded in 1993 by assassinated Lebanese Prime Minister Rafik Al Hariri and is presently owned by Lebanese businessmen. *Al Rai* is a Kuwaiti-based conglomerate, which owns a TV channel (broadcast on Nilesat and Arabsat), radio stations, and the newspaper *Al Rai*. In 2008–2009, the conglomerate expanded to include a printing press, *Al Nasher*, and it now owns the entire production chain from producing content to publishing it. It also produces TV drama series in Egypt and in Syria.[201]

Although the video channels sector remains concentrated, a number of smaller noteworthy players exist. Especially important is the surge in the number of private channels since the onset of the January 25 revolution. Whether or not these channels have obtained licenses to broadcast, and why some have been shut down, remains unclear.[202] While some channels are completely new and are either owned by businessmen or represent certain political parties, some preexisting channels have launched live news coverage channels. None have been able to obtain an actual license to do so.[203]

An increasingly important local player adding to the voices on the scene is Sawiris' ONTV. Another channel owned by Sawiris is OTV, which began broadcasting in 2007 as an entertainment channel.[204] The quest to
p. 908 broadcast live by non-state-owned channels an issue of contention. For example, ONTV's ↳ 24-hour news station was launched in 2011. Yet, it took a few months before a live coverage channel could launch.[205]

Other popular local Egyptian players include Melody Entertainment Holding and *Mazzika*. Melody was established in 2000 and is engaged in film and music production, radio, mobile entertainment, artist management, and advertising.[206]*Mazzika* is an entertainment channel that is part of the larger *Alam Al Fan* media conglomerate, owns another TV channel, Zoom, and is a large record label that rivals Saudi-based Rotana.[207]

Religious TV programming also has considerable viewership in Egypt. In 2007, Mohamed Hassan, an influential Salafi preacher in Egypt, launched *Al Rahma* TV.[208] At the time, Salafi channels' content focused on religious doctrine and advice and refrained from criticizing the government.[209] The former regime allowed channels to exist with the goal of positioning them as rivals to the Muslim Brotherhood, which was not allowed to operate a TV channel of its own. These channels include *Al Nass*, and *Al Hafith,* which are owned by Saudi conglomerate *Al Baraheen*. They have faced shutdowns by the government based on claims that they were advertising unlicensed medical products.[210]

Conclusion

Although recent law amendments alleviated the official monopoly of the state over terrestrial television, control over the industry has not been relinquished. No terrestrial licenses have been issued and complete concentration resides in the hands of government.

In the arena of satellite television, there is a clear dichotomy in the approach between entertainment and news media. The Egyptian Center for News, incorporating ERTU's and NTN's news channels, broadcasts news bulletins. Alternatively, even though the government holds a stake in privately owned *Al Mehwar* and Dream TV, they are prohibited from airing news and can only host shows with censored political commentary. Meanwhile, the boom in satellite television channels that followed the Mubarak-era control over televised political content is still marred by intermittent clampdowns.

The major privately owned Arab media empires are mostly owned by members of the ruling regimes in the Gulf, making this ownership quasi-private in nature. This showcases the typical marriage between media business and politics in the Arab world. This marriage allows for similar content regulation in different countries and provides for self-censorship within each country within the Arab world.

The quasi-private nature of this industry also brings regional politics into the satellite sphere. Media battles between ERTU's space channels and Al Jazeera are a case in point. Another example is Saudi and Egyptian ownership of satellites Arabsat and Nilesat, which polarizes infrastructural power between these two countries. Although the table and graph for video channel providers exhibit the lowest HHI levels and NI levels in audiovisual media, in reality the figures do not reveal the concealed concentration presented by the ownership dynamics in the hands of politically prominent individuals. Nonetheless, 2001 marked significant private entry into the Egyptian market

p. 909 as an accessible medium across the country to fill a critical ↳ informational gap, Egypt's authoritarian regime was wary of opening it up for private ownership. Hence, the barring of any political content from private channels falls outside the scope of the concentration figures shown in Table 29.5. Again, political concentration becomes evident as the regime tightened its reign on radio content and ownership. Media activists see the opening up of radio licensing to nongovernmental enterprises as a key tool to fill the information gap and allow access to knowledge, particularly in the country's peripheries.

Meanwhile, players in the entertainment industry, including satellite channel providers, satellite platforms, and print media have exhibited substantial horizontal integration. A point in case is Rotana, which is backed by the financial clout of the Saudi royal family and has used its brand name to leverage its entry into radio, film production, satellite broadcasting, and magazines.

Audiovisual Media

Television is Egypt's most popular mass medium: 90% of Egyptians own a television set and 70% own a
p. 893 satellite receiver.[94] Radio ranks ↳ second with approximately 80% of households in 2007 owning a radio set.[95] The high level of exposure offered by audiovisual media gives it strategic political importance. Subsequently, it attracts acute interest from the ruling regime.

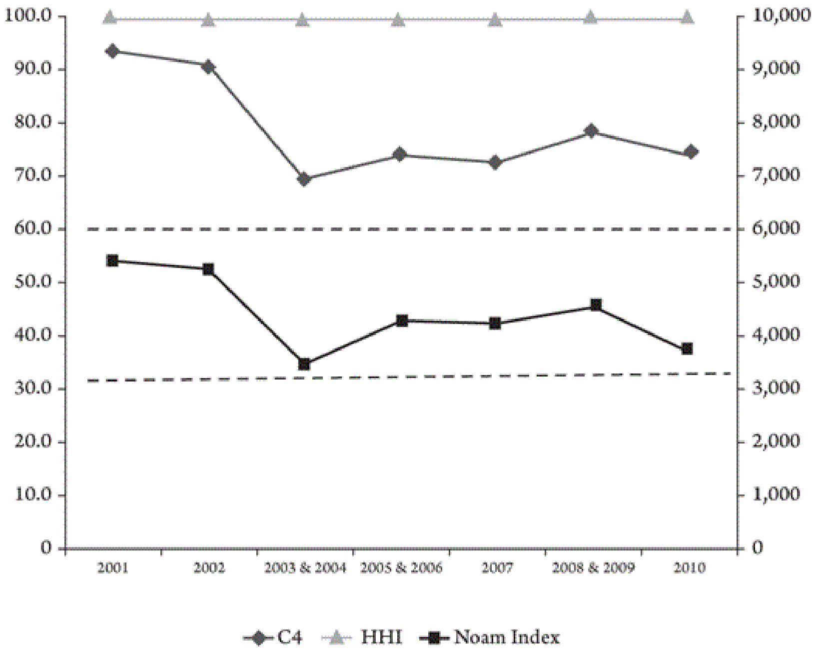
Until 2012, Egypt's authorities kept an iron grip over audiovisual media, including television, radio, and satellite TV. Control is maintained in three ways: regulatory measures, maintenance of a monopoly over the industry or industry infrastructure, and informal censorship. The latter is practiced by tacitly ensuring that key players and gatekeepers in privately owned outlets are political allies to the ruling regime.

Thus far, the state has retained full discretion over the granting of licenses to media corporations. These licenses are issued without a clear set of rules or procedures and in "a highly selective manner."[96] On the ownership side, the Egyptian government owns major mediaplayers in order to directly compete in the market. Additionally, it monopolizes the infrastructural backbone for media corporations to limit competition to an approved set of players. Although subject to state influence, Egypt has witnessed unprecedented successful private initiatives in the post-millennium era and particularly after the revolution of January 25, 2011.

Radio

Radio is the second most popular form of media in Egypt.[97] Due to its strategic political importance, the radio industry in Egypt is almost completely dominated by the government through the state-run Egyptian Radio and Television Union (ERTU) (Graph 29.2). ERTU has remained a monopoly, with very limited
p. 894 participation from international companies' Arabized ↳ stations, including BBC Arabic radio service, Voice of America Arabic service, and Monte Carlo Arabic service. In 2003, Nile Radio Productions was the first private Egyptian company to enter the radio market.

Graph 29.2



Radio Concentration

In 1981, ERTU's radio networks were divided into seven divisions according to content, ranging from commercial to religious (Qur'an), educational, and cultural stations. The local radio network expanded to cover local cities and administrative districts including Alexandria, Upper Egypt, Sinai, and overseas.[98] Qur'an channel has the largest audience and accounts for the greatest part of ERTU's radio market share.[99]

Nile Radio Productions (NRP) was established in 2003 and consists of two music stations: Nile FM broadcasts in English and Nogoom FM broadcasts in Arabic. Good News Group, an entertainment and media conglomerate in the Middle East and North Africa, owns a 25% stake in NRP.[100] In contrast to ERTU's archaic content that includes outdated music and radio presenters broadcasting in classic Arabic, these two stations provide current pop culture entertainment. Meanwhile, NRP was prohibited by the government to air any newscasts; content was restricted to entertainment only.[101] Even though NRP's coverage is geographically limited to Cairo, its modern content and savvy advertising explain why it gained ground quickly. Its success is evident in the sharp dip in HHI and NI in 2003 (see Table 29.2). Its recent web launch helped it reach listeners in Alexandria, Egypt's second largest urban city, and also earned it an expatriate and international audience abroad. Amr Adeeb, managing director of NRP, head of the entertainment division at the Good News Group, reported advertising revenues in the first year of operation to be a record-breaking $3.2 million.[102]

Table 29-2. Radio Concentration

Radio							
Market Shares by Listenership (%)	**2001**	**2002**	**2003 and 2004**	**2005 and 2006**	**2007**	**2008 and 2009**	**2010**
Egyptian Radio and Television Union (ERTU) (public)	96.6	95.2	82.2	85.1	84.1	88.0	85.4
Nile Radio Productions (NRP) (Local, Private)	N/A	N/A	12.7	11.7	13.0	10.0	10.4
Eza'at Masr	N/A	N/A	N/A	N/A	N/A	N/A	2.2
BBC (UK)	1.3	0.6	1.0	0.6	0.5	0.3	0.2
Monte Carlo (France)	1.3	1.0	0.7	0.5	0.1	0.1	0.1
Voice of America (US)	0.4	2.6	3.0	1.8	1.8	1.1	1.3
Radio France (France)	N/A	0.0	0.0	0.0	0.0	0.0	0.0
Deutsche Welle (DW) (Germany)	N/A	N/A	N/A	N/A	N/A	N/A	0.0
Others	0.4	0.6	0.4	0.3	0.4	0.4	0.4
Revenue Estimates (mil $)			13.0			39.0	
C4	99.6	99.4	98.9	99.2	99.4	99.4	99.3
HHI	9,335	9,071	6,929	7,383	7,245	7,845	7,408
Number of players (*n*)	3	3	4	3	3	3	4
Noam Index	5,390	5,237	3,464	4,262	4,183	4,530	3,704

Source: PARC Radio Reach survey 2001–2010.

Note: For the years 2003–2006, the sampling was conducted over a two-year period and so values represent two years' work.

N/A: No data available.

Emad Eddin Adeeb, the owner, was close to the Mubarak regime, and this is believed to have aided him in investing in a private radio venture.[103] In fact, after the launch of the private radio channels, the newspaper *Al Alam Al Youm* provided positive commentary on Mubarak's pledge to run the first multi-candidate elections in 2005. Moreover, the general manager of the radio channels, Amr Adeeb, provided critical commentary on the president's opponents in his nightly talk show broadcasted via satellite.[104]

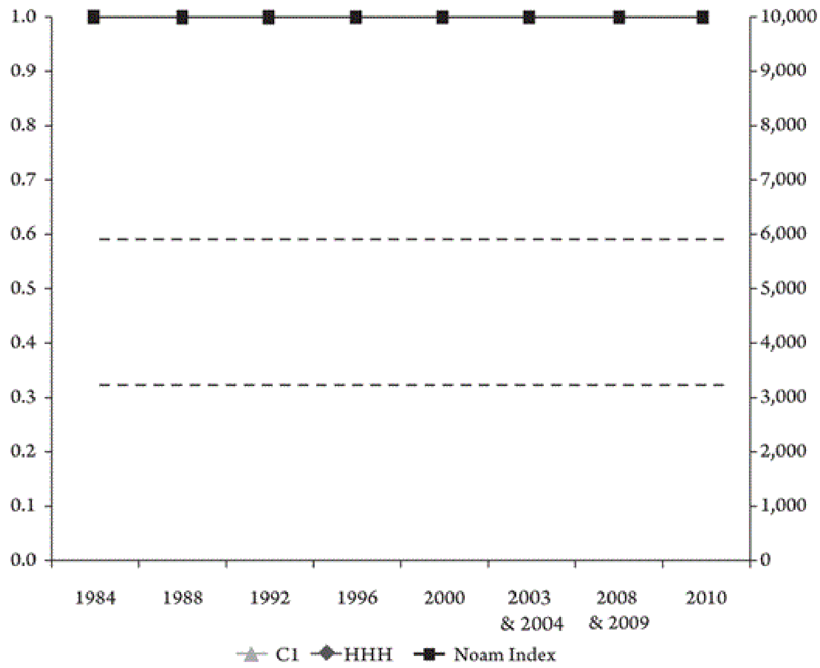
NRP was a game changer because it commercialized the long neglected radio market in Egypt. In response to NRP's emergence as a new player, ERTU altered its content strategy and in 2009 established its own media agency, *Sawt Al Qahira* (Voice of Egypt), responsible for commercializing ERTU's media activities.[105] In the same year, ERTU launched the Egyptian Radio Network (ERN) with four new FM stations with nationwide coverage,[106] including Radio Misr in 2009,[107] a private–public radio station, with presenters broadcasting in Egyptian dialect and providing news bulletins interspersed between contemporary music.[108] Many are detecting the changing nature of Radio Misr's content, which became more politicized in the aftermath of
 the January 25 revolution when politics became an inevitable topic for conversation in all media outlets. ↳

p. 896 Many groups flirting with the idea of setting up a radio station have kicked off online channels, which also shows the difficulty of appropriating the airwaves. In turn, the government's Draft Broadcast Law in 2008 included "computer networks" and "digital media" in its scope of audiovisual content to bring these outlets into the legal constraints placed on other media outlets.[109]

Broadcast Television (Over-the-Air)

Broadcast television is the monopoly of the Ministry of Information, which owns and manages state television and radio through the ERTU.[110] State monopoly over audiovisual terrestrial broadcasts through the ERTU is legally granted by Law no. 13 of 1979, and its amendment by Law no. 223 of 1989.[111] By 2008, new laws officially suspended the state's monopoly by allowing for the allocation of terrestrial broadcast licensing[112] but maintained restrictions on broadcasting content.[113] Although hopeful entrepreneurs are in line applying for these terrestrial licenses, by spring 2013 none had been issued (Graph 29.3).[114]

Graph 29.3



Broadcast TV Concentration

ERTU reports to the Ministry of Information,[115] who in turn delivers "political 'guidance' on an annual basis."[116] It dominates the audiovisual market, owning Egyptian Television Network (ETN), the only terrestrial broadcaster, which includes eight local channels. Owned and run by the state since its establishment in 1960,[117] terrestrial television has been a mouthpiece for each governing regime. Anger and discontent with the state media's biased coverage of key events has made the Maspero building, which houses the ERTU, a site for major protests since the January 25 revolution.

ERTU also owns a major stake in Nile Television Network (NTN), a main satellite and channel provider in the Arab world. It owns 50% of Egyptian Media Production City (EMPC), established in 2000[118] as a main provider of equipment, studios, and technical support for audiovisual media content. It benefits from tax exemptions and other legal incentives,[119] thus attracting private players to license Egyptian-owned satellite channels.

ERTU also owns a 40% stake in the joint stock company Nilesat, the only provider of satellite broadcasting services in Egypt and a major provider to the Arab World, airing more than 600 channels, 76% of which are free (Table 29.3).[120] These include Egyptian TV (ETV), which sells its specially produced programs and soap
p. 897 operas to the Arab World, Nile TV, Nile News, and seven other specialized channels.[121] ↳

Table 29-3. Broadcast TV Concentration

TV Broadcasting								
Market Shares by Viewership (%)	**1984**	**1988**	**1992**	**1996**	**2000**	**2003 and 2004**	**2008 and 2009**	**2010**
Egyptian Radio and Television Union (ERTU) (Public)	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Revenue Estimates (mil $)						162.0	243.0	
C1	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
HHI	10,000	10,000	10,000	10,000	10,000	10,000	10,000	10,000
Noam Index	10,000	10,000	10,000	10,000	10,000	10,000	10,000	10,000
Number of players (*n*)	1	1	1	1	1	1	1	1

Source: ERTU is the only company allowed to broadcast terrestrial television.

Note: Revenue estimates are for the years 2004 and 2008 based on the figures in other developing countries in this project provided by the editor.

p. 898 The launch of the first private satellite channels, Dream TV in 2001 and Mehwar in 2002,[122] was "a face-saving procedure" in response to growing political pressures on state-led liberalization.[123] Egyptian state television—both terrestrial and satellite—has been exposed to competition by private satellite broadcasters in entertainment media. However, Decree 411 of 2000 placed restrictions on broadcast content and genre.[124] Since private broadcasters are not permitted to supply their own newscasts,[125] limited competition ensures that the government maintains a tight grasp on political censorship. Even though ERTU owns a share in both Dream TV and Mehwar, neither of these channels air newscasts.[126] To circumvent restrictions on news content, private channels produced talk shows with cautious commentary on issues in the news. This became the only permissible form of political expression. Nevertheless, these talk shows gained popularity and professional television journalism offered an alternative news narrative to that of ERTU. This was especially true of the coverage of the January 25 revolution and the ensuing events.

p. 899

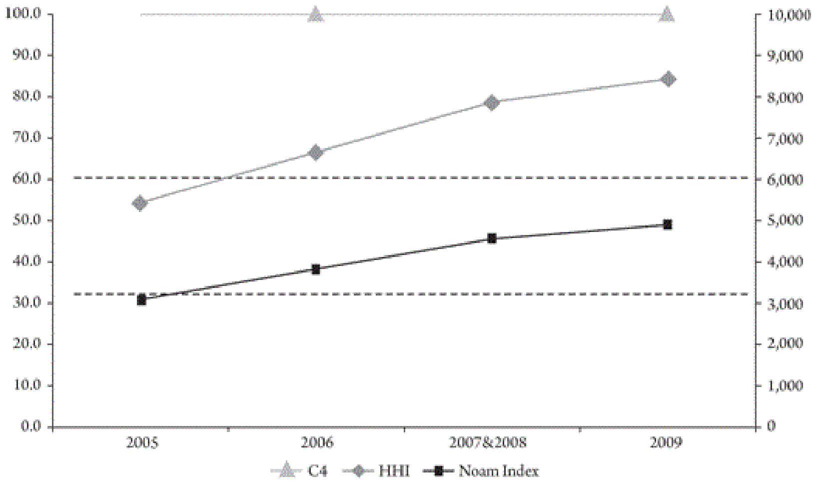
Multichannel TV Platforms

While cable television was introduced in other parts of the world in the 1970s and 1980s, this was not the case in Egypt because it was not a priority for the state at that time.[127]

In 1990, ERTU, along with private shareholders, received approval from the government to establish Cable News Egypt (CNE) as "the first Pay-TV project in the Arab world."[128] While carrying the "cable" title, CNE did not use cable technology, but actually used terrestrial broadcasting technology for "rebroadcasting."[129] CNE was established within a cooperative agreement with CNN for 25 years, with the main purpose of retransmitting CNN International in Egypt. The chair of ERTU also chaired CNE. Additionally, ERTU retained control over "CNE's ultra high frequency channel (UHF)."[130]

Later in the 1990s, Egypt "bypassed cable straight into satellite television."[131] Three main multichannel platform providers cater to Egypt and the Arab region with a combined bundle of channels: Arab Radio Television (ART), Orbit, and Showtime Arabia, established in 1993, 1994, and 1996, respectively (Graph 29.4).[132] ART was founded by Saudi Arabia's Sheikh Saleh Kamel through his Arab Digital Distribution Company (ADD) and is based in the United Arab Emirates.[133,134] Apart from operations in the Middle East and North Africa, ADD owns Pehla, another satellite platform in Asia,[135] and Firstnet, which broadcasts to Europe and the Americas.[136] Kamel is also a partner in the prominent channel provider, the Middle East Broadcasting Center (MBC),[137] and ART also owns major film production studios in the region.[138]

Graph 29.4



Multichannel Platform Concentration

The Orbit network is a subsidiary of the Saudi investment company, Mawarid Group.[139] Mawarid Group also owns subsidiaries in telecommunications, satellite television, and radio networks.[140] The Orbit network targets its content toward a more affluent customer profile and was based in Rome until 2005, when it moved to Bahrain.[141] Showtime Arabia is the only one of three pay-TV networks that is not Saudi-owned. The Kuwait Company Projects Holding (KIPCO) owns controlling shares in Showtime Arabia, and the remaining 21% is owned by the CBS Corporation.[142] Showtime and Orbit p. 900 ↳ merged in 2009.[143] This merger came under the Panther Media Group; a company registered in the Dubai International Financial Center and is jointly owned by KIPCO and the Orbit Group.[144]

Table 29.4 only addresses the pay-TV market for platform providers for which data were available. It is worth noting that pay-TV has captured a minimal share of the satellite market. Estimates reveal that only 4% of the total population in 2009 subscribed to a network.[145] In 2005, Booz and Co (previously Booz and Allen) confirmed these figures in a study that reported only 1 million subscribers in the Arab region for the three main platform providers: ART, Orbit, and Showtime.[146] Pay networks are in direct competition with free-to-air satellite, including state-owned Nilesat,[147] Saudi Sheikh Walid Al Ibrahim's MBC,[148] the international Lebanese Broadcasting Corporation (LBC) based in the Cayman Islands,[149] and Dubai Media Incorporated (DMI), which is partly owned by ART's Kamel and the government.[150]

Table 29-4. Multichannel Video Platform Concentration

Multichannel Platforms (Cable, Satellite)				
Market Shares by Viewership (%)	**2005**	**2006**	**2007 and 2008**	**2009**
ART (Saudi)	69.50	80.10	88.10	91.50
Orbit (Mawarid Group, Saudi Arabia*)	20.67	9.30	7.07	6.86
Showtime (KIPCO Kuwait 79%, CBS USA 21%)	9.83	10.58	4.84	1.62
Star Select				
Revenue Estimates (mil $)	75.0		164.0	
C4	100.0	100.0	100.0	100.0
HHI	5,354	6,614	7,835	8,422
Noam Index	3,091	3,819	4,524	4,862
Number of players (*n*)	3	3	3	3

Source: PARC PayTV Reports 2005–2009.

* Orbit and Showtime merged in July 2009. Data for this year refer to each company separately.

Additionally, pay-TV network subscriptions are hampered by receivers that use sharing servers to illegally decode transmissions by pay-TV platforms. These decoders offer the same array of channels with no subscription fees. Hence, Egyptians could view the same content as pay-TV platform subscribers with only an investment in a receiver and DSL connection. To combat illegal ↳ viewing in December 2010, the Orbit p. 901 Showtime Network successfully distributed set-top boxes that use a conditional access system (CAS) to all its subscribers. These boxes bar unofficial reception of its channels by other receivers. The network has also lobbied the government to enforce new regulatory measures that would cease illegal viewership.[151]

Video Channels

Satellite channels have brought a regional dimension to the market and eliminated redundant local media.[152] Table 29.5 and Graph 29.5 for video channel providers illustrate one of the lowest HHI levels across the spectrum of industries studied in this chapter. Egypt has traditionally been a pioneer for entertainment media.[153] Although figures reveal that the industry remains concentrated, ownership shows substantial participation from regional players, most notably Gulf States. Within the last decade, oil-rich Arab states with ample investment power have imported Egyptian ownership and regulation policies. Initially, this allowed Egyptian professionals to program content and create their own competing entertainment industry.[154] Today, with two of the largest media empires owned by Saudi Arabia, the country has become a major contender in satellite airwaves with free-to-air television. This includes Western channels such as Newscorp's Fox International that have been dubbed for Arab viewers.

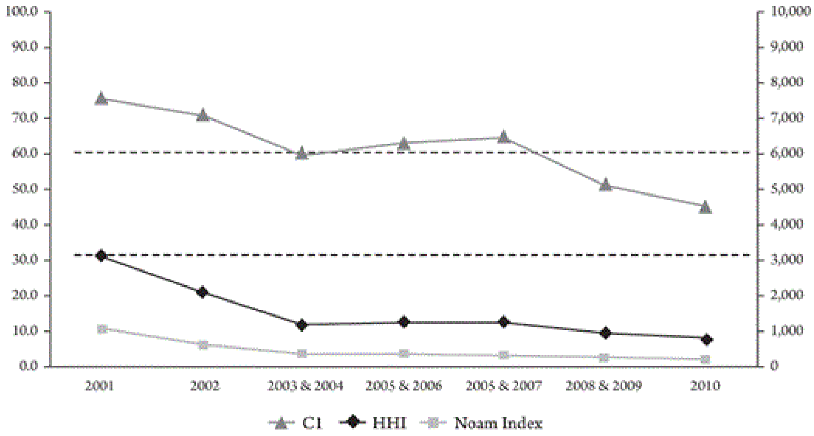
Table 29-5. Video Channel Concentration

Video Channels							
Market Shares based on viewership (%) ERTU (Public)	**2001**	**2002**	**2003 and 2004**	**2005 and 2006**	**2007**	**2008 and 2009**	**2010**
ERTU (Public)							
Egypt Satellite Channel (ESC) (Public)	6.6	7.4	10.9	3.0	2.0	2.1	1.8
NTN (Public)	53.8	40.0	23.0	16.7	18.3	14.7	10.0
Al Jazeera (Qatar Government)	8.7	6.4	6.2	6.3	5.6	3.8	2.1
MBC (Saudi Arabia)	4.7	3.2	10.3	11.9	12.7	11.3	9.2
Future TV Network (Private, Lebanon)	1.8	1.4	1.1	0.2	0.2	0.2	0.0
ART (Saudi Arabia)	1.1	6.0	7.1	7.5	2.0	2.4	1.4
DMI (Public, Dubai)	6.2	3.2	3.5	2.8	2.3	1.7	0.3
BBC (Pubic, UK)	0.4	0.4	0.1	0.0	0.0	0.1	0.0
CNN (Time Warner, USA)	3.3	1.0	0.1	0.0	0.0	0.1	0.0
Dream TV Network (Private)	N/A	17.4	15.7	12.3	13.3	9.8	6.4
Al Mehwar (83% private, 17% public)	N/A	4.4	4.7	3.4	4.3	4.9	4.2
Melody Entertainment Holding (Private)	N/A	1.6	2.7	4.0	2.3	6.2	5.7
Saudi TV (Saudi Arabia)	N/A	0.8	0.4	0.1	0.1	0.1	0.1
Rotana (Private, Saudi Arabia)	N/A	N/A	4.1	21.7	20.4	15.4	9.7
LBC (merged with Rotana in 2007)	4.7	3.2	2.7	0.6		N/A	N/A
Mazzika (Private)	N/A	N/A	4.4	2.3	1.8	1.2	1.1
Al Majd TV (Private, Saudi Arabia)	N/A	N/A	0.3	5.0	2.7	0.9	2.4
Spacetoon (Private, Headquarters in Dubai)	N/A	N/A	0.6	0.3	0.3	0.4	0.1
Al Rai TV (Private, Kuwait)	N/A	N/A	N/A	0.2	0.0	0.1	0.1
OTV (Private)	N/A	N/A	N/A	N/A	0.1	0.3	0.3
Hayat (Private)	N/A	N/A	N/A	N/A	0.0	2.1	13.3
Al Baraheen International (Saudi Arabia)	N/A	N/A	N/A	N/A	9.5	9.6	6.1
Modern TV	N/A	N/A	N/A	N/A	N/A	2.0	3.9
Panorama	N/A	N/A	N/A	N/A	N/A	7.0	12.2
Al Rahma TV (Private, Sheikh Saleh)	N/A	N/A	N/A	N/A	N/A	N/A	2.9
Moga Comedy (Private)	N/A	N/A	N/A	N/A	N/A	N/A	3.0
Others	8.7	3.6	2.26	1.8	2.1	3.8	4.0
Revenue Estimates (mil $)			333.0			510.0	
C4	75.3	71.2	59.8	62.6	64.6	51.2	45.2
HHI	3,114	2,090	1,172	1,214	1,256	919	782
Number of Players (*n*)	9	12	13	12	13	15	17
Noam Index	1,038	603	325	351	348	237	190

Source: PARC Household Viewership Survey 2001–2010.

N/A: Data not available.

Graph 29.5



Video Channel Concentration

Infrastructure and Regulation

The Arab Satellite and Communications Organization (Arabsat), headquartered in Riyadh, Saudi Arabia, was established in 1976. Jointly owned by the Arab League of Nations, Arabsat shares are concentrated in the p. 902 hands of oil-rich nations including Saudi Arabia, Kuwait, ↳

p. 903 ↳

p. 904 ↳

Libya, and Qatar, which ranked as the four top shareholders.[155]

The second satellite company in the region is Egypt's Nilesat, partly owned by the Egyptian government through its media vehicle, ERTU.[156] Egypt first notified the International Telecommunications Union of its intention to obtain an orbital slot after being expelled from the Arab League, and consequently Arabsat, in 1979 because of its peace treaty with Israel. However, its allocation was not assigned until 1995.[157] With one satellite headquartered in Saudi Arabia and the other in Egypt, both countries were able to launch rival attempts at controlling regional satellite broadcasting.[158] A legal case unfolded after SCAF announced in September 2011 that it would ban the issuing of new satellite licenses. Saudi Arabia announced the transfer of all of its channels from Nilesat to Arabsat, a tactical move that caused the Egyptian television industry to sustain losses.[159]

While these satellites have allowed for transnational television to proliferate, the country that owns the satellite platform also controls content. For example, news sources revealed that Nilesat suspended Al Jazeera's signal on January 30, 2011, during the toppled regime's battle to survive the revolutionary ascent of 2011.[160] Moreover, self-censorship imposed by nations broadcasting on Nilesat and Arabsat exposed transnational television to a level of state-control similar to local terrestrial channels.[161]

In Egypt, the Ministry of Information is responsible for licensing satellite channels and requires already p. 905 existing satellite channels to acquire permission for live coverage of events ↳ and the distribution of news to other channels.[162] Despite this, there is no specialized regulatory body governing the broadcast market.[163] New channels wishing to start up in Egypt had to abide by a minimum capitalization of US$4.5 million and vow to maintain the same genre of content.[164] Decree 411 of 2000 is concerned with television licensing and restricts companies from broadcasting content of their choice, especially with regard to news content.[165]

Ownership

ERTU was the first company to use Arabsat by launching the Egyptian Space Channel (ESC) in December 1990.[166] The ESC became so popular that Kuwaiti and Bahraini governments arranged to distribute the channel nationally through terrestrial networks.[167] Also owned by ERTU,[168] NTN started in 1993 under the name Nile TV International.[169] It offers nine specialized channels, all of which became free-to-air as of 2005.[170]

Privately owned Dream TV, Egypt's first satellite contender, launched in 2001 with start-up capital of US$5 million,[171] a miniscule figure relative to Gulf-financed channel providers. *Al Mehwar* followed Dream TV as the second private satellite channel and launched in early 2002. Well-known businessmen own 83% of the channel. The government owns the remaining 17% through ERTU, EMPC, and Nilesat.[172] While the content aired on both channels is theoretically considered "editorially independent,"[173] both channels are restricted from broadcasting news despite ERTU's ownership stake in these private companies.[174]

The launch of the first private channels, owned largely by business moguls with close ties to Mubarak's regime, initiated a trend in Egypt where businessmen have shown a vested interest in the power of media. This also includes *Al Hayat* Channel, owned by Badawi,[175] and Sawiris' ONTV. After the revolution of January
p. 906 25, 2011, additional channels have acquired licenses[176] and are run by business magnates[177] ↳ such as Mohammed Al Amin's CBC.[178] Amin also owns considerable shares in *Al Nahar* satellite channel, *Al Youm Al Sabae* newspaper,[179] and *Al Watan* daily.

In the regional landscape, the early 1990s saw a boost from Saudi-owned satellite channels including MBC and ART.[180] MBC was first launched in 1991 from London, and has been headquartered in Dubai Media City[181] since 2002. MBC is a market leader among Arab media conglomerates with strong viewership in the Pan-Arab region. MBC owns 10 television stations in addition to two radio stations, online interfaces, and documentary producers.[182]

Saudi control of the market is furthered by Rotana Group, which is considered one of the largest media companies in the region. Owned by Al Walid Bin Talal and part of the Kingdom Holding Company,[183] Rotana brings strong representation from the Gulf across a number of entertainment media outlets. News sources in early 2010 announced plans from management to list Rotana on the London and Dubai stock exchange with reported valuations for Rotana Group amounting to just over US$770 million.[184] Rotana's satellite division hosts 11 channels featuring music and film entertainment. A new general entertainment channel targeted specifically at the Egyptian market[185] has recently been announced. Apart from satellite television, Rotana owns the largest record label in the Arab World,[186] prints its own magazine, and is a major distributor of Arabic movies, with a library exceeding 1,600 films.[187]

As early as 2003, when Prince Talal fully acquired Rotana,[188] it became clear that his strategy was to work toward consolidating a media empire. That same year he reduced his previous stake in ART to 5% in addition to creating the Rotana music channel, based on ART's previously existing music channel.[189] Prince Talal increased his stake in LBC to 85% in July 2008, and merged it with Rotana.[190] LBC was already a conglomerate in its own right, privately owned by Lebanese businessmen. Rotana's cross-ownership in the Arab world also extends to global partners. Talal owns a 7% stake in News Corp[191] and conversely, Rupert Murdoch has come to own a 9% stake in Rotana as of 2010.[192] This partnership between two burgeoning media empires is expected to grow as News Corp has the option to extend its stake in Rotana. Talal also
p. 907 owns sizeable shares in Time Warner and Euro Disney.[193] Rotana's ↳ merger with LBC and expansion into other media forms is often considered part of a strategy designed to take on MBC.[194]

Another important player is Al Jazeera. Owned and financed by the government of Qatar, Al Jazeera Satellite Channel (JSC) was launched in November 1996 as the first Arab channel to offer 24-hour news.[195] In 2006, with a US$150 million grant from the Emir of Qatar,[196] Al Jazeera International was deployed, earning it attention from Western audiences.[197] After Mubarak stepped down in February 2011,[198] Al Jazeera Mubasher Misr was launched without a license to cover live events in Egypt. It was shut down in September 2011.[199] Al Jazeera has been the site of tensions with the Egyptian and Saudi regimes, exemplifying regional media battles. After ousting his father in 1995, the new Crown Prince of Qatar, Sheikh Hamad Bin Khalifa Al Thani, developed a rift with Saudi Arabia and Egypt. Initially, Al Jazeera attacked Egypt and Saudi Arabia because of their negative newspaper coverage of this bloodless coup and because they housed the former Qatari regime's supporters.[200] Owned by the Emir himself, Al Jazeera quickly earned a reputation for uncensored criticism of Egyptian and Saudi rule.

The market has included other regional conglomerates. For example, Future Television Network is a private Lebanese channel founded in 1993 by assassinated Lebanese Prime Minister Rafik Al Hariri and is presently owned by Lebanese businessmen. *Al Rai* is a Kuwaiti-based conglomerate, which owns a TV channel (broadcast on Nilesat and Arabsat), radio stations, and the newspaper *Al Rai*. In 2008–2009, the conglomerate expanded to include a printing press, *Al Nasher*, and it now owns the entire production chain from producing content to publishing it. It also produces TV drama series in Egypt and in Syria.[201]

Although the video channels sector remains concentrated, a number of smaller noteworthy players exist. Especially important is the surge in the number of private channels since the onset of the January 25 revolution. Whether or not these channels have obtained licenses to broadcast, and why some have been shut down, remains unclear.[202] While some channels are completely new and are either owned by businessmen or represent certain political parties, some preexisting channels have launched live news coverage channels. None have been able to obtain an actual license to do so.[203]

An increasingly important local player adding to the voices on the scene is Sawiris' ONTV. Another channel owned by Sawiris is OTV, which began broadcasting in 2007 as an entertainment channel.[204] The quest to
p. 908 broadcast live by non-state-owned channels an issue of contention. For example, ONTV's ↳ 24-hour news station was launched in 2011. Yet, it took a few months before a live coverage channel could launch.[205]

Other popular local Egyptian players include Melody Entertainment Holding and *Mazzika*. Melody was established in 2000 and is engaged in film and music production, radio, mobile entertainment, artist management, and advertising.[206] *Mazzika* is an entertainment channel that is part of the larger *Alam Al Fan* media conglomerate, owns another TV channel, Zoom, and is a large record label that rivals Saudi-based Rotana.[207]

Religious TV programming also has considerable viewership in Egypt. In 2007, Mohamed Hassan, an influential Salafi preacher in Egypt, launched *Al Rahma* TV.[208] At the time, Salafi channels' content focused on religious doctrine and advice and refrained from criticizing the government.[209] The former regime allowed channels to exist with the goal of positioning them as rivals to the Muslim Brotherhood, which was not allowed to operate a TV channel of its own. These channels include *Al Nass*, and *Al Hafith,* which are owned by Saudi conglomerate *Al Baraheen*. They have faced shutdowns by the government based on claims that they were advertising unlicensed medical products.[210]

Conclusion

Although recent law amendments alleviated the official monopoly of the state over terrestrial television, control over the industry has not been relinquished. No terrestrial licenses have been issued and complete concentration resides in the hands of government.

In the arena of satellite television, there is a clear dichotomy in the approach between entertainment and news media. The Egyptian Center for News, incorporating ERTU's and NTN's news channels, broadcasts news bulletins. Alternatively, even though the government holds a stake in privately owned *Al Mehwar* and Dream TV, they are prohibited from airing news and can only host shows with censored political commentary. Meanwhile, the boom in satellite television channels that followed the Mubarak-era control over televised political content is still marred by intermittent clampdowns.

The major privately owned Arab media empires are mostly owned by members of the ruling regimes in the Gulf, making this ownership quasi-private in nature. This showcases the typical marriage between media business and politics in the Arab world. This marriage allows for similar content regulation in different countries and provides for self-censorship within each country within the Arab world.

The quasi-private nature of this industry also brings regional politics into the satellite sphere. Media battles between ERTU's space channels and Al Jazeera are a case in point. Another example is Saudi and Egyptian ownership of satellites Arabsat and Nilesat, which polarizes infrastructural power between these two countries. Although the table and graph for video channel providers exhibit the lowest HHI levels and NI levels in audiovisual media, in reality the figures do not reveal the concealed concentration presented by the ownership dynamics in the hands of politically prominent individuals. Nonetheless, 2001 marked significant private entry into the Egyptian market

p. 909 as an accessible medium across the country to fill a critical ↳ informational gap, Egypt's authoritarian regime was wary of opening it up for private ownership. Hence, the barring of any political content from private channels falls outside the scope of the concentration figures shown in Table 29.5. Again, political concentration becomes evident as the regime tightened its reign on radio content and ownership. Media activists see the opening up of radio licensing to nongovernmental enterprises as a key tool to fill the information gap and allow access to knowledge, particularly in the country's peripheries.

Meanwhile, players in the entertainment industry, including satellite channel providers, satellite platforms, and print media have exhibited substantial horizontal integration. A point in case is Rotana, which is backed by the financial clout of the Saudi royal family and has used its brand name to leverage its entry into radio, film production, satellite broadcasting, and magazines.

Telecommunications Media

The Egyptian telecom sector is characterized by substantial growth and activity. Telecom revenues experienced some of the highest growth rates in the Middle East and Africa, amounting to $6.4 billion in 2010.[211] Its constant evolution, including deregulation by state authorities, mergers, acquisitions, and high-profile ownership disputes since the inception of the first cellular operator license in 1998 lends the industry a reputation for dynamism. Yet, an examination of the ICT market in Egypt as a whole indicates that growth rates differ among the different segments. In general, wireless is growing faster than wireline for both phone and Internet services.

As evident in the Table 29.6, although mobile phone penetration is experiencing exponential growth and wireless broadband is following suit, fixed broadband is growing at a slower rate, whereas the wireline phone market is steadily shrinking.

Table 29-6. Growth of Telecom Sector

Industry Indicator	2009	2010	2011
Mobile telephone Penetration (Individual) (%) Subscribers per 100 inhabitants	72%	90%	100%[1]
Mobile flash drive Internet Subscriptions (millions)	0.35	1.43	2.18
Fixed line penetration (%)	13.4%	12.2%	11.29%[2]
ADSL subscriptions (millions)	1.3%	1.9%	2.1%

Source: Egypt ICT Indicators Portal, MCIT.

1 As of October 2011.

2 "Egypt Major African Mobile Markets: Future Growth Prospects." Africa and Middle East Telecom Week. Last accessed Jan. 18, 2012 at <http://www.africantelecomsnews.com/resources/AfricaOpp_Egypt.shtml>.

The growth, or lack thereof, of each market can be attributed to unique factors within the Egyptian context. To illustrate, high poverty rates have made shared access to ADSL and wirelines common. This matches the trend of shared access of other media referred to earlier in this chapter. Accordingly, official indicators may reveal a spuriously low rate for the fixed market in both Internet and phone. Indeed, statistics reveal, "on average, for every DSL line there are 2.7 households."[212] Generally, lagging demand in the Internet market
p. 910 relative to the cellular phone is due to the 66% literacy rate.[213] Penetration ↳ rates for the mobile market greatly exceed that of wireline despite higher costs because of the extensive network coverage of wireless lines, as well as the historical bureaucratic difficulties of getting a main landline. Furthermore, competition in the mobile phone market has created an array of affordable schemes and subscriptions to address the less affluent segments of society.

From 1957 to 1998, the telecommunications industry was embodied in the Arab Republic of Egypt National Telecom Organization (ARENTO) because of the legacy of the Nasserist regime. Functioning under the auspices of the Ministry of Transportation and Communication, ARENTO was a state-owned company that encompassed all telecom regulatory and operational functions and was also responsible for road networks (such as highways) and postal services.[214] In 1998, ARENTO was transformed into Telecom Egypt (TE), a joint stock company.[215] This marks the beginning of significant restructuring impetus at the public policy level.[216] Noteworthy, however, is the fact that Law no. 19 of 1998 requires that the Egyptian government maintain a majority stake in TE.[217] In 1999, the Ministry of Communications and Information Technology (MCIT) was inaugurated by presidential decree with the mandate to regulate and develop Egypt's information and communications technology sector, separating regulatory functions from TE's operational role in the market.[218] These functions were then relayed to the National Telecom Regulatory Authority (NTRA), established in 2003.[219]

NTRA's mandate encompasses the liberalization of the telecom sector, expanding the broadband network capacity, developing technological foundations for increased data services and reforming telecom regulations in order to promote Egypt's information sector and e-economy.[220] In 2009, NTRA launched two triple-play licenses[221] that allow cable television, Internet, and phone over a single-access broadband connection. This has created an increased potential for media convergence, as the three wireless operators integrate a host of services into one subscription. The implications of a triple play license and the potential benefit to these companies remain vague since the auctioned license is geographically limited and is in its experimental phase.

Today, the structure of the telecom industry in Egypt resembles the one prevalent in a number of other countries (e.g., France and the UAE). The state retains the monopoly over the infrastructural backbone of the industry and offers wholesale services to licensed operators through its joint-stock company, TE. The state has allowed private and foreign participation in retail markets through offering bandwidth, hosting other infrastructural services at economically viable prices.[222]

Wireline

TE continues to be Egypt's sole wireline provider (Table 29.7; Graph 29.6). The Ministry of Transport and
p. 911 Communications was in charge of setting the overall strategy for the industry ↳

p. 912 ↳

while ARENTO strictly held responsibilities for operational functions.[223] The Ministry lacked a clear and calculated vision for telecom development in Egypt and liberally reallocated ARENTO's revenues toward other infrastructural projects, a common practice in most less developed countries.[224] ARENTO also had to dedicate the sum of US$17 million of its annual revenues toward the Ministry of Transport and Communications, further debilitating its ability to expand its network coverage.[225]

Table 29-7. Wireline Telecommunications Concentration

Wireline Telecommunications											
Market Shares (%)	**1984**	**1988**	**1992**	**1996**	**2000**	**2004**	**2006**	**2007**	**2008**	**2009**	**2010**
Telecom Egypt (Public, Egypt)	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Revenue from wireline ONLY (mil EGP)[1]							5,361.4	4,999.7	3,014.9	2,618.3	
Total Rev,[2] including services (mil EGP)					3,181.8	7,802.2	9,488.4	9,993.1	10,116.9	9,960.3	10,318.0
Revenue (mil $)[3]						1260.5	1647.9	1754.2	1897.0	1779.8	1811.7
C1	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
HHI	10,000	10,000	10,000	10,000	10,000	10,000	10,000	10,000	10,000	10,000	10,000
Noam Index	10,000	10,000	10,000	10,000	10,000	10,000	10,000	10,000	10,000	10,000	10,000
Number of players (*n*)	1	1	1	1	1	1	1	1	1	1	1

Graph 29.6

Wireline Telecommunications Concentration

Wireline Telecommunications Concentration

The concentration of telecom in the hands of one state company bore negative implications on the supply and accessibility of landlines. ARENTO's customers suffered from long waiting lists, creating a backlog of 1.2 million lines in 1994 due to a lack of infrastructural capacity.[226] Additionally, poor network coverage limited to cities, as well as substandard customer service and failure to collect delinquent revenues, gave the company its notorious reputation for inefficiency.[227]

In 1998, the liberalization of the telecommunication sector was kick-started with ARENTO becoming TE. At that point, it became legally equipped to play a strategic role in other telecom-related industries through mergers and acquisitions.[228] The same year saw the issuance of licenses for two payphone operators, Menatel and Nile Telecom. In 1998, a consortium of private and public corporations, including Orascom, France Telecom, and *Al Ahram* Press, bought out TE's 70% share in Egyptian Company for Mobile Services (ECMS).[229] Additionally, Vodafone acquired the second operating license and entered the market as Misrfone. The introduction of these players proved a success in terms of enhanced service and quality standards.[230]

p. 913 **Ownership**

In 2005, 20% of the TE's total shares were made available in an initial public offering on the Cairo and London Stock Exchanges,[231] while the Egyptian government retained the remaining 80%.[232] TE offers retail and wholesale services. Its main retail service is fixed line telephony. Its cross-ownership in wireless telecom is through its 45% ownership stake in Vodafone Egypt.[233] TE also owns TEData,[234] the leading Internet service provider for fixed broadband. TE's presence in these different segments ensures that the company maintains its status as a strong player in Egypt's ICT sector and gives the government a firm footing in the telecom industry through indirect ownership.

Although TE has been experiencing dwindling retail revenues and subscriptions in the fixed wireline market, these are countered by growing wholesale revenues from leased optical fiber cables that run across the entire country, coupled with its presence in wireless telephony as well as wireless and fixed broadband.[235] While TE is the sole provider of wireline services in Egypt, its diversified, tactical, and low-risk investment strategy and infrastructural assets established it as a key constituent in the ICT sector. In addition to local and international wireline services, economic barriers to entry for new players mean that TE monopolizes the nation's optic fiber backbone and provides a range of wholesale services that include the leasing of telephony capacity and data services to wireless operators and ISPs.[236]

In 2008, NTRA announced the bid through an auction[237] for a second fixed-line license,[238] heralding the end of TE's monopoly. Nevertheless, it postponed the bid several times on grounds of the then deteriorating economic conditions, which would have allegedly affected the success of the auction.[239] The license would span for a period of 20 years and offer triple play functions, with the exception of mobile services.[240]

The decision to offer the second license was an attempt to increase competition in the wireline market. Strategically, NTRA prohibited any of the three wireless operators, Mobinil, Vodafone, or Etisalat, to participate in the auction to protect the "welfare of the telecom user."[241] Allowing these operators who were already strongly present in wireless and ISP segments to bid for a fixed line license reinforced an even stronger oligopoly. The same ruling, however, did not apply to the shareholders of the mobile operators. TE's Senior Vice President for Commercial Affairs attributed the failure of the bid for a second fixed line
p. 914 license to the fact that ↳ barriers to entry to this market were no longer political, but economic.[243] Rival fixed-line telephony is difficult due to the shrinking market and major upfront investments. In contrast, the retail revenue in wireless markets attracts more attention from investors because it is an easier option.

TE's outbound operations span across a number of IT industries and include three companies: Xceed, Centra, and MERC. Xceed, a leading regional call center, began operations in 2003. TE also owns Centra, an IT solutions provider established in 2002. In addition to providing complete IT solutions, the company produces top-quality PCs, notebooks, and servers. MERC is a joint stock company established in 2001, which builds, operates, and manages wireless communication stations.[244]

Wireless

Although the mobile market is relatively in its nascence, with the first private telecom operator founded in 1998, the industry has been evolving at a brisk pace. ARENTO founded the Egyptian Company for Mobile Services (ECMS) in 1996, and a year later opened the bid for cellular operating licenses to the private sector.[245] In May 1998, Mobinil acquired ECMS. Also in 1998, Mobinil acquired Egypt's first GSM license.[246] In 2001, ARENTO granted the second GSM license to Click GSM, renamed Vodafone Egypt.[247]

Mobinil and Vodafone's duopoly lasted from 1998 until 2007. In 2007, the government licensed a third operator, Etisalat, to increase competition and improve network coverage of Egypt's growing wireless market.[248] Despite the presence of a solid duopoly, Etisalat's entry heralded record growth rates in Egypt's mobile market.[249] Although Vodafone and Mobinil minimized their prices and removed administrative fees in an effort to retain customers,[250] Etisalat successfully countered these attempts. It was the first operator to provide 3.5G technologies introducing mobile Internet among other new data services,[251] as well as the cheapest call rates.[252] These services and rates helped it earn 1 million subscribers within the first 50 days of operating.[253]

From the onset, Mobinil and Vodafone have had almost an equal 50% market share. Using subscribers as a proxy puts Mobinil in the lead with slightly over 51% market share, whereas using ARPU would rank Vodafone ahead of Mobinil. The market for mobile telephony has been growing steadily. Upon entry into the market, Etisalat was able to capture 8.6% of the market, while Mobinil and Vodafone remain in the same relative positions, with 48.7% and 42.7% market shares, respectively, in 2008.

 Early in May 2011, NTRA announced it would start taking tenders for a fourth mobile operator using a "mobile virtual network license," which uses the infrastructure and network of other existing operators.[254] In this case, the eventual license holder would resell mobile services that the company buys from Mobinil, Vodafone Egypt, or Etisalat. TE has announced interest in acquiring the mobile virtual network license, which the mobile operators claim is "an unfair advantage in the marketplace," given that TE already has a monopoly over wireline.[255]

The wireless telecommunications sector in Egypt includes significant private sector participation and foreign influence compared to other media industries. All operators are joint stock companies. While Mobinil is headquartered in Egypt, Vodafone is headquartered in the United Kingdom and Etisalat Egypt is located in the UAE. The three companies operate within the jurisdiction of NTRA. Although technically the market is dominated by an oligopoly, in reality, it is highly competitive. Prices have been declining and mobile penetration rates in Egypt have been soaring. Official figures indicate that penetration has reached 100 subscribers per 100 inhabitants as of October 2011.[256]

Ownership

The ownership structure of each of the three private operators bears interesting insight. The Egyptian Company for Mobile Services (Mobinil), a local private firm listed on the Egyptian stock exchange, offers wireless phone and data services through USBs and mobile Internet. Although first in the wireless market, Mobinil was the last of the three companies to enter the fixed broadband market in 2010 by acquiring Egypt's second largest DSL provider, LinkdotNet. Until early 2011, Orascom Telecom Holding (OTH) and France Telecom owned 35% and 36% of the shares, respectively, in Mobinil. The remaining 29% was publicly traded.[257] In February 2012, France Telecom acquired 71% of the shares in Mobinil, with the remaining 29% owned by OTH.[258] In June 2012, France Telecom acquired 94% of Mobinil.[259]

OTH is one of Egypt's largest conglomerates, owned by business mogul Sawiris and family. Apart from Mobinil in Egypt, Orascom Telecom owns significant stakes in foreign telecom enterprises in over 10 countries in the Middle East and Africa, ranging from wireless and wireline telecom, ISPs, and IT hardware.[260] France Telecom is one of the largest telecom networks worldwide, with global operations in a range of telecom-related industries including ISP and cable television (Orascom Group, 2011). In 2008, Mobinil filed a legal suit against TE on the back of TE lowering its fixed-to-mobile rates despite a legal agreement between the two (interconnect agreement). On September 3, 2008, NTRA supported TE in its position, ruling in favor of TE. Consequently, Mobinil filed a lawsuit against the regulator in November 2008
p. 916 as its decision contradicts the contracts between TE and the operator. In September 2009, Mobinil also filed ↳ for arbitration against TE. At the end of 2009, NTRA issued a decree changing the interconnect tariffs in favor of TE. Mobinil continues its legal effort against this decision.[261]

What began as a dispute over an agreement signed in 2001 between Orascom Telecom and France Telecom (partners in Mobinil's holding company), evolved into a case of international arbitration between the two[262] in 2009. An international court ruled that France Telecom was obliged to buy Orascom Telecom's shares in Mobinil for US$45.5 per share by April 2009.[263] The Egyptian Capital Markets Authority (CMA) and Orascom Telecom argued that the arbitration results meant that France Telecom was to make an offer for the entire company, including minority shareholders' shares. While France Telecom argued that this should be a voluntary offer, it nevertheless made several offers which were rejected on the grounds of the price being lower than that of the other shares.[264] In late 2009, the NTRA confirmed that in the case of Orascom Telecom selling its shares to France Telecom, the presence of an Egyptian partner in Mobinil was mandatory.[265] In April 2010, Orascom Telecom and France Telecom ended all legal disputes between them with regards to their ownership of Mobinil. The signed agreement does not change voting rights and gives Orascom Telecom "put option rights" to sell all its Mobinil and ECMS stake to France Telecom at certain periods up to November 2013.[266]

The other two wireless carriers involve some foreign ownership: 66% of Etisalat Egypt is owned by Etisalat UAE, with Egypt Post, National Bank of Egypt, and Commercial International Bank owning the remaining 34%.[267] Etisalat Egypt is a subsidiary of Etisalat UAE, the largest carrier and network provider in the Middle East, operating in Asia, the Middle East, and Africa.[268] The Emirati government owns a 60% share of Etisalat UAE and the remaining 40% is traded in the Abu Dhabi Securities Exchange (ADX).[269] In 2008, Etisalat Egypt acquired EgyNet and Nile Online, two of the top five contenders in the fixed broadband market.

Vodafone Egypt is a subsidiary of Vodafone Group Plc. and is listed on the London Stock Exchange. It operates in six continents worldwide. Vodafone Egypt is jointly owned by TE (45%) and Britain's Vodafone.[270] Apart from a host of data services including wireless telephony and broadband, Vodafone Egypt was first to enter the fixed line broadband market in 2006 by acquiring Raya, one of the top five DSL providers in Egypt.

p. 917 State ownership is evident in all three companies. There is a French presence in Mobinil. As of December 2010, the French government owns about 27% of France Telecom. The Egyptian government owns almost half of Vodafone Egypt and the UAE government controls Etisalat. These operators offer a wide range of mobile telephony and Internet services and are not allowed to bid for fixed licenses to prevent monopolistic or oligopolistic structures.[271]

Teletech, an Egyptian consortium led by Vodafone, was the first to receive a triple play license from MCIT. Link followed with its consortium, which includes Orascom Telecom and Mobinil.[272] Mobinil and Vodafone's acquisition of these licenses is in line with a trend toward business models with integrated services, indicative of strong potential for media convergence in the future of the Egyptian market.

Analysis

Although HHI figures are high (see Table 29.8), indicating a concentrated market, the decline from almost 7,000 to 4,300 between 1998 and 2008 shows greater diversity and competition (Graph 29.7). As evident in the table, C3 remains at 100% throughout the timeline and the HHI and NI take a significant dip at the entry of each new firm. This denotes the successful absorption of sufficient market share despite monopolistic barriers. The ability of new entrants to overcome these barriers exists for several reasons.

Table 29-8. Wireless Telecommunications Concentration

Wireless Telecommunications							
Market Shares by Subscribers (%)		**1998**	**2000**	**2002**	**2004**	**2006**	**2008**
Mobinil (Private, Egypt) (94% France Telecom, 5% Orascom Telecom, 1% free float)	81.0	54.6	52.3	53.3	51.5	48.7	35.1
Vodafone Group Plc. (Private, UK)							
Vodafone Egypt (55% Britain's Vodafone, 45% Telecom Egypt, Public)	19.0	45.4	47.7	46.7	48.5	42.7	40.6
Etisalat (Public/Private, UAE)							
EtisalatMisr (66% Etisalat UAE, 34% Egypt Post, National Bank of Egypt and Commercial International Bank)	0.0	0.0	0.0	0.0	0.0	8.6	24.3
Total Rev (mil EGP)			5,204.5	10,056.5	15,754.1	23,030.4	
Revenue[1] (mil $)			1,156.6	1,624.7	2,736.1	4,318.4	
C3	100.0	100.0	100.0	100.0	100.0	100.0	100.0
HHI	6,922	5,042	5,011	5,022	5,005	4,269	3,471
Noam Index	4,895	3,565	3,543	3,551	3,539	2,465	2,004
Number of players (*n*)	2	2	2	2	2	3	3

Source: Figures obtained from the Ministry of Communications and Information Technology (MCIT).

Note: If we are to calculate market shares by revenue we expect almost the same situation, but with Vodafone Egypt ranking first instead of Mobinil since Vodafone's ARPU is higher.

1 Converted from original in EGP using respective year exchange rate from the Central Bank of Egypt's Annual Reports.

Graph 29.7

Wireless Telecommunications Concentration

Wireless Telecommunications Concentration

First, the mobile market in Egypt is a growing market that was for the most part unsaturated, allowing each entrant a share of a growing pie. Second, all three companies are publicly listed companies and enjoy the backing of large multinational corporations with significant telecom-related expertise and financial resources, allowing them to undergo onerous costs of entry and enter the market on strong footing in the face of fierce price wars.

In turn, the general decline in prices helped enlarge the wireless market even further by making mobile subscriptions more affordable to poorer segments of society, including rural areas that were cut off from main landlines. In Egypt as in many developing countries, mobile phones are easier to acquire than landlines.[273] Even though the latter may be cheaper, we see falling subscriptions[274] and revenues per line for fixed lines.[275] Price wars heightened with the entry of Etisalat further saturating the market, and penetration levels grew at an annual rate of 18.31% in 2010 and peaked at 100% in October 2011.[276] With penetration levels this high, companies focused their efforts on providing superior customer and data services to gain an edge over their competitors, a level of competition that is ideal for advancing consumer welfare despite the oligopolistic state of the industry.

Third, the role of the Egyptian government as an indirect market player in providing the infrastructure and regulating the market helped level the playing field for Etisalat's entrance, thereby encouraging companies to revert to price wars to gain advantage, all for the benefit of the consumer. For example, optical fiber p. 918 leases from TE for all three operators are non-preferential,[277] thereby ↳

p. 919 ↳

maintaining a similar cost structure for older and newer companies alike. No laws prevent private wireless companies from establishing their own fiber lines, but it is more cost-effective for them to lease out TE's infrastructure.[278] The wholesale price is in effect manipulated by TE to ensure it is always cheaper for operators to lease infrastructure from TE rather than build their own new infrastructure.

In 2008, NTRA launched mobile number portability services (MNP),[279] which made it worthwhile for customers to bear the switching costs of moving between operators without having to change their phone numbers.

Conclusion

While the Egyptian wireline industry is totally concentrated, the wireless industry is open for a strong private sector presence. The wireline state monopoly is a case that rests purely on economic motivation. This is contrary to ERTU in the case of terrestrial broadcasting and radio, where state monopoly emanates from a political motivation intended to curb freedom of expression.

While the wireless industry is less concentrated, the government retains some authority. The transformation of ARENTO into TE meant that the government had relinquished some of its overbearing role in a pertinent and growing industry. The extent to which it let go of the reins in the telecom market is dubious. Apart from the fact that TE gained firm footing in the wireless and fixed broadband market through indirect ownership, economic barriers to entry mean that TE monopolizes the nation's optic fiber backbone for wireless and fixed telecom and leases out this infrastructure to all three companies, Mobinil, Vodafone, and Etisalat. Dwindling revenues and subscription numbers in the fixed wireline market are countered by growing revenues from leased optical fiber cables that run across the entire country. This, coupled with a presence in wireless telephony, as well as wireless and fixed broadband, help the company maintain its status as a strong player in Egypt's ICT sector.

Meanwhile, increasing media convergence has meant that field players have delved into a cross-industrial p. 920 endeavor. A case in point is private cellular operators bundling wireless ↳ Internet with their services and acquiring broadband companies. Given the flexibility of connectivity and the ease of use, wireless telephony has expanded widely in Egypt, as is the case in other developing countries. Mobile phones have a developmental angle as they empower and facilitate businesses, but they are also used for political mobilization. Indeed, mobile phones have promoted political participation, which surely was unwelcome by the regime. Eventually, the regime cut off telephone connectivity and text messaging during the revolution of January 25, 2011, generating another political victory of the state over the wireless industry. This backfired against the regime because it fueled further political dissent in addition to the collateral damage manifested in economic losses. This is another instance where, contrary to what the regime in Egypt had planned, the political aspects of media use could not be separated from economic facets.

Telecommunications Media

The Egyptian telecom sector is characterized by substantial growth and activity. Telecom revenues experienced some of the highest growth rates in the Middle East and Africa, amounting to $6.4 billion in 2010.[211] Its constant evolution, including deregulation by state authorities, mergers, acquisitions, and high-profile ownership disputes since the inception of the first cellular operator license in 1998 lends the industry a reputation for dynamism. Yet, an examination of the ICT market in Egypt as a whole indicates that growth rates differ among the different segments. In general, wireless is growing faster than wireline for both phone and Internet services.

As evident in the Table 29.6, although mobile phone penetration is experiencing exponential growth and wireless broadband is following suit, fixed broadband is growing at a slower rate, whereas the wireline phone market is steadily shrinking.

Table 29-6. Growth of Telecom Sector

Industry Indicator	2009	2010	2011
Mobile telephone Penetration (Individual) (%) Subscribers per 100 inhabitants	72%	90%	100%[1]
Mobile flash drive Internet Subscriptions (millions)	0.35	1.43	2.18
Fixed line penetration (%)	13.4%	12.2%	11.29%[2]
ADSL subscriptions (millions)	1.3%	1.9%	2.1%

Source: Egypt ICT Indicators Portal, MCIT.

1 As of October 2011.

2 "Egypt Major African Mobile Markets: Future Growth Prospects." Africa and Middle East Telecom Week. Last accessed Jan. 18, 2012 at <http://www.africantelecomsnews.com/resources/AfricaOpp_Egypt.shtml>.

The growth, or lack thereof, of each market can be attributed to unique factors within the Egyptian context. To illustrate, high poverty rates have made shared access to ADSL and wirelines common. This matches the trend of shared access of other media referred to earlier in this chapter. Accordingly, official indicators may reveal a spuriously low rate for the fixed market in both Internet and phone. Indeed, statistics reveal, "on average, for every DSL line there are 2.7 households."[212] Generally, lagging demand in the Internet market relative to the cellular phone is due to the 66% literacy rate.[213] Penetration p. 910 rates for the mobile market greatly exceed that of wireline despite higher costs because of the extensive network coverage of wireless lines, as well as the historical bureaucratic difficulties of getting a main landline. Furthermore, competition in the mobile phone market has created an array of affordable schemes and subscriptions to address the less affluent segments of society.

From 1957 to 1998, the telecommunications industry was embodied in the Arab Republic of Egypt National Telecom Organization (ARENTO) because of the legacy of the Nasserist regime. Functioning under the auspices of the Ministry of Transportation and Communication, ARENTO was a state-owned company that encompassed all telecom regulatory and operational functions and was also responsible for road networks (such as highways) and postal services.[214] In 1998, ARENTO was transformed into Telecom Egypt (TE), a joint stock company.[215] This marks the beginning of significant restructuring impetus at the public policy level.[216] Noteworthy, however, is the fact that Law no. 19 of 1998 requires that the Egyptian government maintain a majority stake in TE.[217] In 1999, the Ministry of Communications and Information Technology (MCIT) was inaugurated by presidential decree with the mandate to regulate and develop Egypt's information and communications technology sector, separating regulatory functions from TE's operational role in the market.[218] These functions were then relayed to the National Telecom Regulatory Authority (NTRA), established in 2003.[219]

NTRA's mandate encompasses the liberalization of the telecom sector, expanding the broadband network capacity, developing technological foundations for increased data services and reforming telecom regulations in order to promote Egypt's information sector and e-economy.[220] In 2009, NTRA launched two triple-play licenses[221] that allow cable television, Internet, and phone over a single-access broadband connection. This has created an increased potential for media convergence, as the three wireless operators integrate a host of services into one subscription. The implications of a triple play license and the potential benefit to these companies remain vague since the auctioned license is geographically limited and is in its experimental phase.

Today, the structure of the telecom industry in Egypt resembles the one prevalent in a number of other countries (e.g., France and the UAE). The state retains the monopoly over the infrastructural backbone of the industry and offers wholesale services to licensed operators through its joint-stock company, TE. The state has allowed private and foreign participation in retail markets through offering bandwidth, hosting other infrastructural services at economically viable prices.[222]

Wireline

TE continues to be Egypt's sole wireline provider (Table 29.7; Graph 29.6). The Ministry of Transport and
p. 911 Communications was in charge of setting the overall strategy for the industry ↳

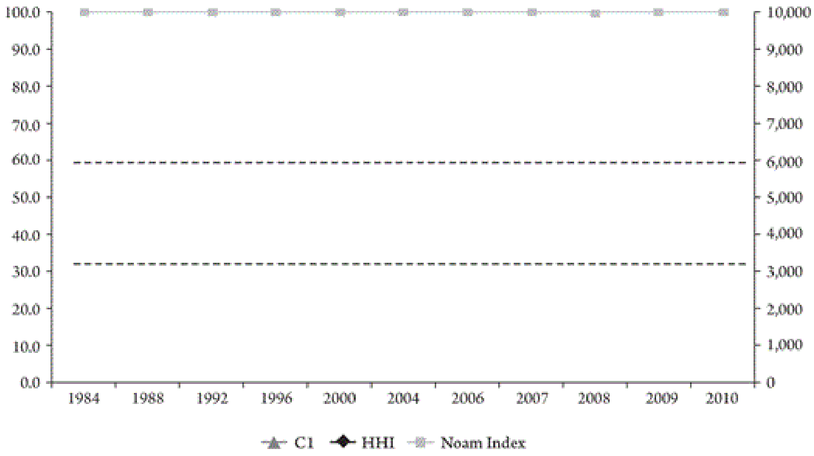
p. 912 ↳

while ARENTO strictly held responsibilities for operational functions.[223] The Ministry lacked a clear and calculated vision for telecom development in Egypt and liberally reallocated ARENTO's revenues toward other infrastructural projects, a common practice in most less developed countries.[224] ARENTO also had to dedicate the sum of US$17 million of its annual revenues toward the Ministry of Transport and Communications, further debilitating its ability to expand its network coverage.[225]

Table 29-7. Wireline Telecommunications Concentration

Wireline Telecommunications											
Market Shares (%)	**1984**	**1988**	**1992**	**1996**	**2000**	**2004**	**2006**	**2007**	**2008**	**2009**	**2010**
Telecom Egypt (Public, Egypt)	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Revenue from wireline ONLY (mil EGP)[1]							5,361.4	4,999.7	3,014.9	2,618.3	
Total Rev,[2] including services (mil EGP)					3,181.8	7,802.2	9,488.4	9,993.1	10,116.9	9,960.3	10,318.0
Revenue (mil $)[3]						1260.5	1647.9	1754.2	1897.0	1779.8	1811.7
C1	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
HHI	10,000	10,000	10,000	10,000	10,000	10,000	10,000	10,000	10,000	10,000	10,000
Noam Index	10,000	10,000	10,000	10,000	10,000	10,000	10,000	10,000	10,000	10,000	10,000
Number of players (*n*)	1	1	1	1	1	1	1	1	1	1	1

Graph 29.6



Wireline Telecommunications Concentration

The concentration of telecom in the hands of one state company bore negative implications on the supply and accessibility of landlines. ARENTO's customers suffered from long waiting lists, creating a backlog of 1.2 million lines in 1994 due to a lack of infrastructural capacity.[226] Additionally, poor network coverage limited to cities, as well as substandard customer service and failure to collect delinquent revenues, gave the company its notorious reputation for inefficiency.[227]

In 1998, the liberalization of the telecommunication sector was kick-started with ARENTO becoming TE. At that point, it became legally equipped to play a strategic role in other telecom-related industries through mergers and acquisitions.[228] The same year saw the issuance of licenses for two payphone operators, Menatel and Nile Telecom. In 1998, a consortium of private and public corporations, including Orascom, France Telecom, and *Al Ahram* Press, bought out TE's 70% share in Egyptian Company for Mobile Services (ECMS).[229] Additionally, Vodafone acquired the second operating license and entered the market as Misrfone. The introduction of these players proved a success in terms of enhanced service and quality standards.[230]

Ownership

In 2005, 20% of the TE's total shares were made available in an initial public offering on the Cairo and London Stock Exchanges,[231] while the Egyptian government retained the remaining 80%.[232] TE offers retail and wholesale services. Its main retail service is fixed line telephony. Its cross-ownership in wireless telecom is through its 45% ownership stake in Vodafone Egypt.[233] TE also owns TEData,[234] the leading Internet service provider for fixed broadband. TE's presence in these different segments ensures that the company maintains its status as a strong player in Egypt's ICT sector and gives the government a firm footing in the telecom industry through indirect ownership.

Although TE has been experiencing dwindling retail revenues and subscriptions in the fixed wireline market, these are countered by growing wholesale revenues from leased optical fiber cables that run across the entire country, coupled with its presence in wireless telephony as well as wireless and fixed broadband.[235] While TE is the sole provider of wireline services in Egypt, its diversified, tactical, and low-risk investment strategy and infrastructural assets established it as a key constituent in the ICT sector. In addition to local and international wireline services, economic barriers to entry for new players mean that TE monopolizes the nation's optic fiber backbone and provides a range of wholesale services that include the leasing of telephony capacity and data services to wireless operators and ISPs.[236]

In 2008, NTRA announced the bid through an auction[237] for a second fixed-line license,[238] heralding the end of TE's monopoly. Nevertheless, it postponed the bid several times on grounds of the then deteriorating economic conditions, which would have allegedly affected the success of the auction.[239] The license would span for a period of 20 years and offer triple play functions, with the exception of mobile services.[240]

The decision to offer the second license was an attempt to increase competition in the wireline market. Strategically, NTRA prohibited any of the three wireless operators, Mobinil, Vodafone, or Etisalat, to participate in the auction to protect the "welfare of the telecom user."[241] Allowing these operators who were already strongly present in wireless and ISP segments to bid for a fixed line license reinforced an even stronger oligopoly. The same ruling, however, did not apply to the shareholders of the mobile operators.[242] TE's Senior Vice President for Commercial Affairs attributed the failure of the bid for a second fixed line license to the fact that ↳ barriers to entry to this market were no longer political, but economic.[243] Rival p. 914 fixed-line telephony is difficult due to the shrinking market and major upfront investments. In contrast, the retail revenue in wireless markets attracts more attention from investors because it is an easier option.

TE's outbound operations span across a number of IT industries and include three companies: Xceed, Centra, and MERC. Xceed, a leading regional call center, began operations in 2003. TE also owns Centra, an IT solutions provider established in 2002. In addition to providing complete IT solutions, the company produces top-quality PCs, notebooks, and servers. MERC is a joint stock company established in 2001, which builds, operates, and manages wireless communication stations.[244]

Wireless

Although the mobile market is relatively in its nascence, with the first private telecom operator founded in 1998, the industry has been evolving at a brisk pace. ARENTO founded the Egyptian Company for Mobile Services (ECMS) in 1996, and a year later opened the bid for cellular operating licenses to the private sector.[245] In May 1998, Mobinil acquired ECMS. Also in 1998, Mobinil acquired Egypt's first GSM license.[246] In 2001, ARENTO granted the second GSM license to Click GSM, renamed Vodafone Egypt.[247]

Mobinil and Vodafone's duopoly lasted from 1998 until 2007. In 2007, the government licensed a third operator, Etisalat, to increase competition and improve network coverage of Egypt's growing wireless market.[248] Despite the presence of a solid duopoly, Etisalat's entry heralded record growth rates in Egypt's mobile market.[249] Although Vodafone and Mobinil minimized their prices and removed administrative fees in an effort to retain customers,[250] Etisalat successfully countered these attempts. It was the first operator to provide 3.5G technologies introducing mobile Internet among other new data services,[251] as well as the cheapest call rates.[252] These services and rates helped it earn 1 million subscribers within the first 50 days of operating.[253]

From the onset, Mobinil and Vodafone have had almost an equal 50% market share. Using subscribers as a proxy puts Mobinil in the lead with slightly over 51% market share, whereas using ARPU would rank Vodafone ahead of Mobinil. The market for mobile telephony has been growing steadily. Upon entry into the market, Etisalat was able to capture 8.6% of the market, while Mobinil and Vodafone remain in the same relative positions, with 48.7% and 42.7% market shares, respectively, in 2008.

p. 915 Early in May 2011, NTRA announced it would start taking tenders for a fourth mobile operator using a "mobile virtual network license," which uses the infrastructure and network of other existing operators.[254] In this case, the eventual license holder would resell mobile services that the company buys from Mobinil, Vodafone Egypt, or Etisalat. TE has announced interest in acquiring the mobile virtual network license, which the mobile operators claim is "an unfair advantage in the marketplace," given that TE already has a monopoly over wireline.[255]

The wireless telecommunications sector in Egypt includes significant private sector participation and foreign influence compared to other media industries. All operators are joint stock companies. While Mobinil is headquartered in Egypt, Vodafone is headquartered in the United Kingdom and Etisalat Egypt is located in the UAE. The three companies operate within the jurisdiction of NTRA. Although technically the market is dominated by an oligopoly, in reality, it is highly competitive. Prices have been declining and mobile penetration rates in Egypt have been soaring. Official figures indicate that penetration has reached 100 subscribers per 100 inhabitants as of October 2011.[256]

Ownership

The ownership structure of each of the three private operators bears interesting insight. The Egyptian Company for Mobile Services (Mobinil), a local private firm listed on the Egyptian stock exchange, offers wireless phone and data services through USBs and mobile Internet. Although first in the wireless market, Mobinil was the last of the three companies to enter the fixed broadband market in 2010 by acquiring Egypt's second largest DSL provider, LinkdotNet. Until early 2011, Orascom Telecom Holding (OTH) and France Telecom owned 35% and 36% of the shares, respectively, in Mobinil. The remaining 29% was publicly traded.[257] In February 2012, France Telecom acquired 71% of the shares in Mobinil, with the remaining 29% owned by OTH.[258] In June 2012, France Telecom acquired 94% of Mobinil.[259]

OTH is one of Egypt's largest conglomerates, owned by business mogul Sawiris and family. Apart from Mobinil in Egypt, Orascom Telecom owns significant stakes in foreign telecom enterprises in over 10 countries in the Middle East and Africa, ranging from wireless and wireline telecom, ISPs, and IT hardware.[260] France Telecom is one of the largest telecom networks worldwide, with global operations in a range of telecom-related industries including ISP and cable television (Orascom Group, 2011). In 2008, Mobinil filed a legal suit against TE on the back of TE lowering its fixed-to-mobile rates despite a legal agreement between the two (interconnect agreement). On September 3, 2008, NTRA supported TE in its position, ruling in favor of TE. Consequently, Mobinil filed a lawsuit against the regulator in November 2008
p. 916 as its decision contradicts the contracts between TE and the operator. In September 2009, Mobinil also filed ↳ for arbitration against TE. At the end of 2009, NTRA issued a decree changing the interconnect tariffs in favor of TE. Mobinil continues its legal effort against this decision.[261]

What began as a dispute over an agreement signed in 2001 between Orascom Telecom and France Telecom (partners in Mobinil's holding company), evolved into a case of international arbitration between the two[262] in 2009. An international court ruled that France Telecom was obliged to buy Orascom Telecom's shares in Mobinil for US$45.5 per share by April 2009.[263] The Egyptian Capital Markets Authority (CMA) and Orascom Telecom argued that the arbitration results meant that France Telecom was to make an offer for the entire company, including minority shareholders' shares. While France Telecom argued that this should be a voluntary offer, it nevertheless made several offers which were rejected on the grounds of the price being lower than that of the other shares.[264] In late 2009, the NTRA confirmed that in the case of Orascom Telecom selling its shares to France Telecom, the presence of an Egyptian partner in Mobinil was mandatory.[265] In April 2010, Orascom Telecom and France Telecom ended all legal disputes between them with regards to their ownership of Mobinil. The signed agreement does not change voting rights and gives Orascom Telecom "put option rights" to sell all its Mobinil and ECMS stake to France Telecom at certain periods up to November 2013.[266]

The other two wireless carriers involve some foreign ownership: 66% of Etisalat Egypt is owned by Etisalat UAE, with Egypt Post, National Bank of Egypt, and Commercial International Bank owning the remaining 34%.[267] Etisalat Egypt is a subsidiary of Etisalat UAE, the largest carrier and network provider in the Middle East, operating in Asia, the Middle East, and Africa.[268] The Emirati government owns a 60% share of Etisalat UAE and the remaining 40% is traded in the Abu Dhabi Securities Exchange (ADX).[269] In 2008, Etisalat Egypt acquired EgyNet and Nile Online, two of the top five contenders in the fixed broadband market.

Vodafone Egypt is a subsidiary of Vodafone Group Plc. and is listed on the London Stock Exchange. It operates in six continents worldwide. Vodafone Egypt is jointly owned by TE (45%) and Britain's Vodafone.[270] Apart from a host of data services including wireless telephony and broadband, Vodafone Egypt was first to enter the fixed line broadband market in 2006 by acquiring Raya, one of the top five DSL providers in Egypt.

p. 917 State ownership is evident in all three companies. There is a French presence in Mobinil. As of December 2010, the French government owns about 27% of France Telecom. The Egyptian government owns almost half of Vodafone Egypt and the UAE government controls Etisalat. These operators offer a wide range of mobile telephony and Internet services and are not allowed to bid for fixed licenses to prevent monopolistic or oligopolistic structures.[271]

Teletech, an Egyptian consortium led by Vodafone, was the first to receive a triple play license from MCIT. Link followed with its consortium, which includes Orascom Telecom and Mobinil.[272] Mobinil and Vodafone's acquisition of these licenses is in line with a trend toward business models with integrated services, indicative of strong potential for media convergence in the future of the Egyptian market.

Analysis

Although HHI figures are high (see Table 29.8), indicating a concentrated market, the decline from almost 7,000 to 4,300 between 1998 and 2008 shows greater diversity and competition (Graph 29.7). As evident in the table, C3 remains at 100% throughout the timeline and the HHI and NI take a significant dip at the entry of each new firm. This denotes the successful absorption of sufficient market share despite monopolistic barriers. The ability of new entrants to overcome these barriers exists for several reasons.

Table 29-8. Wireless Telecommunications Concentration

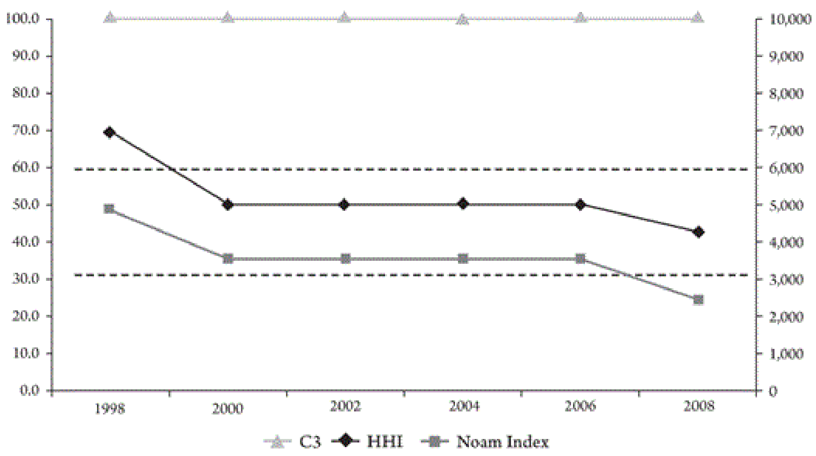
Wireless Telecommunications							
Market Shares by Subscribers (%)		**1998**	**2000**	**2002**	**2004**	**2006**	**2008**
Mobinil (Private, Egypt) (94% France Telecom, 5% Orascom Telecom, 1% free float)	81.0	54.6	52.3	53.3	51.5	48.7	35.1
Vodafone Group Plc. (Private, UK)							
Vodafone Egypt (55% Britain's Vodafone, 45% Telecom Egypt, Public)	19.0	45.4	47.7	46.7	48.5	42.7	40.6
Etisalat (Public/Private, UAE)							
EtisalatMisr (66% Etisalat UAE, 34% Egypt Post, National Bank of Egypt and Commercial International Bank)	0.0	0.0	0.0	0.0	0.0	8.6	24.3
Total Rev (mil EGP)			5,204.5	10,056.5	15,754.1	23,030.4	
Revenue[1] (mil $)			1,156.6	1,624.7	2,736.1	4,318.4	
C3	100.0	100.0	100.0	100.0	100.0	100.0	100.0
HHI	6,922	5,042	5,011	5,022	5,005	4,269	3,471
Noam Index	4,895	3,565	3,543	3,551	3,539	2,465	2,004
Number of players (*n*)	2	2	2	2	2	3	3

Source: Figures obtained from the Ministry of Communications and Information Technology (MCIT).

Note: If we are to calculate market shares by revenue we expect almost the same situation, but with Vodafone Egypt ranking first instead of Mobinil since Vodafone's ARPU is higher.

1 Converted from original in EGP using respective year exchange rate from the Central Bank of Egypt's Annual Reports.

Graph 29.7



Wireless Telecommunications Concentration

First, the mobile market in Egypt is a growing market that was for the most part unsaturated, allowing each entrant a share of a growing pie. Second, all three companies are publicly listed companies and enjoy the backing of large multinational corporations with significant telecom-related expertise and financial resources, allowing them to undergo onerous costs of entry and enter the market on strong footing in the face of fierce price wars.

In turn, the general decline in prices helped enlarge the wireless market even further by making mobile subscriptions more affordable to poorer segments of society, including rural areas that were cut off from main landlines. In Egypt as in many developing countries, mobile phones are easier to acquire than landlines.[273] Even though the latter may be cheaper, we see falling subscriptions[274] and revenues per line for fixed lines.[275] Price wars heightened with the entry of Etisalat further saturating the market, and penetration levels grew at an annual rate of 18.31% in 2010 and peaked at 100% in October 201l.[276] With penetration levels this high, companies focused their efforts on providing superior customer and data services to gain an edge over their competitors, a level of competition that is ideal for advancing consumer welfare despite the oligopolistic state of the industry.

Third, the role of the Egyptian government as an indirect market player in providing the infrastructure and regulating the market helped level the playing field for Etisalat's entrance, thereby encouraging companies to revert to price wars to gain advantage, all for the benefit of the consumer. For example, optical fiber p. 918 leases from TE for all three operators are non-preferential,[277] thereby ↳

p. 919 ↳

maintaining a similar cost structure for older and newer companies alike. No laws prevent private wireless companies from establishing their own fiber lines, but it is more cost-effective for them to lease out TE's infrastructure.[278] The wholesale price is in effect manipulated by TE to ensure it is always cheaper for operators to lease infrastructure from TE rather than build their own new infrastructure.

In 2008, NTRA launched mobile number portability services (MNP),[279] which made it worthwhile for customers to bear the switching costs of moving between operators without having to change their phone numbers.

Conclusion

While the Egyptian wireline industry is totally concentrated, the wireless industry is open for a strong private sector presence. The wireline state monopoly is a case that rests purely on economic motivation. This is contrary to ERTU in the case of terrestrial broadcasting and radio, where state monopoly emanates from a political motivation intended to curb freedom of expression.

While the wireless industry is less concentrated, the government retains some authority. The transformation of ARENTO into TE meant that the government had relinquished some of its overbearing role in a pertinent and growing industry. The extent to which it let go of the reins in the telecom market is dubious. Apart from the fact that TE gained firm footing in the wireless and fixed broadband market through indirect ownership, economic barriers to entry mean that TE monopolizes the nation's optic fiber backbone for wireless and fixed telecom and leases out this infrastructure to all three companies, Mobinil, Vodafone, and Etisalat. Dwindling revenues and subscription numbers in the fixed wireline market are countered by growing revenues from leased optical fiber cables that run across the entire country. This, coupled with a presence in wireless telephony, as well as wireless and fixed broadband, help the company maintain its status as a strong player in Egypt's ICT sector.

Meanwhile, increasing media convergence has meant that field players have delved into a cross-industrial p. 920 endeavor. A case in point is private cellular operators bundling wireless ↳ Internet with their services and acquiring broadband companies. Given the flexibility of connectivity and the ease of use, wireless telephony has expanded widely in Egypt, as is the case in other developing countries. Mobile phones have a developmental angle as they empower and facilitate businesses, but they are also used for political mobilization. Indeed, mobile phones have promoted political participation, which surely was unwelcome by the regime. Eventually, the regime cut off telephone connectivity and text messaging during the revolution of January 25, 2011, generating another political victory of the state over the wireless industry. This backfired against the regime because it fueled further political dissent in addition to the collateral damage manifested in economic losses. This is another instance where, contrary to what the regime in Egypt had planned, the political aspects of media use could not be separated from economic facets.

Internet Service Providers (ISP)

TE leases out wholesale services to ISPs as well as wireline and wireless companies.[280] The Egyptian ISP market is open to the private sector, with the number of ISPs amounting to 220[281] companies in 2010. Nonetheless, Internet penetration rates are markedly low (Table 29.9). Low Internet consumption in Egypt, especially relative to telecom-related industries, may be due to high poverty rates, low literacy levels, and inadequate infrastructure in certain geographical areas.[282]

Table 29-9. Internet Industry Indicators

Industry Indicator	2009	2010	2011 (Oct)
Internet penetration (Users per 100 Inhabitants)	22%	29%	34%
Proportion of households using a computer	44%	44%	48%
Proportion of individuals using a computer from any location in last 12 months	24%	26%	32%

Source: Egypt ICT Indicators: Infrastructure and Access Portal, Ministry of Communications and Information Technology (MCIT). "Key Indicators." Egypt ICT Indicators. May 2010. Last accessed on Dec. 15, 2011 at <http://www.new.egyptictindicators.gov.eg/en/Indicators/_layouts/KeyIndicatorsViewer.aspx>.

ISPs in Egypt are divided into class A, B, and C licenses. Class A licenses have the right to own their own infrastructural equipment as well as rights to international gateways through TE. They can thus provide wholesale services to class B and C ISPs.[283] Class B ISPs retain the right to infrastructure equipment, but gain access to international gateways through class A members. Class C ISPs can only partake in retail Internet services and lease out infrastructure from class A and B organizations. However, all ISPs, lease out the fiber optic cables from TE. Only four ISPs possess class A licenses: TEData, Nile Online, Linkdotegypt and Egynet[284]; another four retain class B licenses: Raya, YallaMisr, Noor, and Menanet.[285] For the purpose of this chapter the analysis addresses the retail market for class A and B ISPs. Market shares are calculated by the total number of subscribers per ISP (including indirect subscribers from class C ISPs, eliminating any duplicates).

The data set for this analysis is only for fixed-line broadband (i.e., DSL services). Cable television based on broadband or FTTX does not exist commercially. However, trials have been made. The reason for the absence of broadband-based cable TV is a lack of competition by cable operators to pursue this sector. Triple play licenses were issued by NTRA in 2009 that allow cable television, Internet, and telephone over a single-access broadband connection. LinkdotEgypt and Tivotech obtained the licenses; however, both licenses have
p. 921 been dormant.[286] ↳ The license does not include wireless broadband USB subscriptions or mobile Internet. Mobinil, Vodafone, and Etisalat are the only providers of wireless broadband services. Nonetheless, their recent acquisition in the fixed line market is addressed in the chapter, as it bears implications on ownership and concentration of ISPs in Egypt.

History and Regulation

The Internet was introduced into Egypt in 1993 by the Information Decision Support Center that granted exclusive services to Egyptian universities to connect with the European Academic Research Network for academic purposes.[287] Ever since, the government and the MCIT have taken quick and concrete steps to propel Egypt into the digital scene. In 1996, the government had further developed the infrastructural backbone for the Internet in order to officially open the data services door to private investors.[288] After 1998, broadband services gained ground and DSL connections were later introduced in 2002.[289]

The NTRA announced the Free Internet Initiative in 2002 in an effort to increase penetration levels through
p. 922 allowing Internet users ↳ access priced at the rate of a regular telephone call instead of charging subscription fees (Table 29.10).[290] ISPs abided by a revenue-sharing model in which TE, the sole telephone landline provider, received a 30% share of revenues from "Internet calls" and the licensed ISP retained the remaining 70%.[291] This initiative succeeded in increasing penetration levels. This was followed by the broadband initiative in 2004, with a goal of transforming Egypt into an "information society" under the umbrella of the e-access program.[292]

Table 29-10. TE DATA Home ADSL Price List (EGP) for Unlimited Access

Speed (Kbps)	1 Month	3 Months	6 Months	12 Months
512	95	280	555	1,090
1,024	140	415	820	1,610
2,048	220	650	1,290	2,530
4,096	380	1,125	2,230	4,380
8,192	695	2,055	4,020	8,000
16,384	1,355	4,010	7,845	15,600
24,576	1,950	5,770	11,310	22,500

Source: TE Data. "Home ADSL Price List." TE DATA 2012. Last accessed Jan. 5, 2012 at <http://www.tedata.net/eg/en/Home-ADSL/Home-ADSL-Prices-List>.

Ownership

Only class A ISPs are licensed to build their own infrastructure. TEData is the leading ISP in Egypt and is a subsidiary of TE. It held 70% of the infrastructure capacity in Egypt and 61% of the DSL market share in 2009.[293] TEData is also active in Jordan.[294] Vodafone gradually acquired Raya; a class B licensed ISP ranked in the top five largest ISPs by market share, raising its stake in Raya from 51% in 2006 to 97% in 2008.[295] Etisalat Egypt closely followed suit and acquired all shares of Egynet and Nile Online (both previously partly owned by TE).[296]

Mobinil was last to enter the DSL market and acquired Linkdotnet from Orascom Telecom Holding, which had the second largest market share after TEData, in 2010 (Table 29.11). Linkdotnet was established in 1995 and is owned by Orascom Telecom Holding.[297] It operates in the Middle East and Asia with offices in the UAE, Saudi Arabia, Algeria, and Pakistan.[298]

Table 29-11. Internet Service Provider Concentration

Internet Service Providers								
Market Shares by Subscribers (%)	**2004**	**2005**	**2006**	**2007**	**2008**	**2009**	**2010**	**2011**
Telecom Egypt/TE (Public) TEData		30.0	44.3	52.0	59.0	60.7	62.9	63.0
LinkdotNet (Private, Orascom Telecom Holding OTH, Egypt)					30.2	28.0	N/A	N/A
EgyNet (Private, Egypt)					N/A	N/A	N/A	N/A
Nile Online (also known as the Egyptian Company for Internet and Digital Infrastructure) (Private, Egypt)					N/A	N/A	N/A	N/A
YallaMisr (Kuwait, Al Kharafi)					0.7	0.2	0.3	0.3
Noor					0.5	0.4	0.5	0.5
Mena Net (Private, Egypt, Gamal Marwan)					0.1	0.0	0.0	0.0
Vodafone Egypt (UK) Vodafone (previously Raya)(Private, UK)					1.9	3.8	6.0	8.0
Etisalat U.A.E. (Public/Private, U.A.E.) Etisalat Misr (Public/Private, UAE)					7.7	6.7	5.7	5.8
Mobinil (Orascom, France Telecom, France)					N/A	N/A	24.4	22.5
Others		70	55.7	48	0	0.2	0.2	0
Revenue Estimates (mil $)	280.0				591.0			
C4					98.7	99.2	99.0	99.2
HHI					4,453	4,532	4,620	4,570
Noam Index					2,226	2,266	2,310	2,285
Number of players (*n*)					4	4	3	4

Source: Figures obtained from Ministry of Communications and Information Technology (MCIT).

Note: This is only for ADSL (fixed line) service providers and does not include wireless broadband. On the wireless broadband front, there is only Vodafone, Mobinil and Etisalat, TE Data are not in that market.

Note 2: For GSM (wireless broadband) Wael Fakharny said that out of 1.5 m lines Etisalat, Vodafone, and Mobinil have 47%, 40%, and 13%, respectively for 2011.

The remaining three companies are YallaMisr, Noor, and Menanet. YallaMisr is owned by a Kuwaiti conglomerate, Al Kharafi Group.[299] Even after diligent research, we have not reached any conclusions on Noor's ownership. Menanet was originally owned by Gamal Marwan, chief executive officer of Menanet, when it was established in 1999. In 2001, it was acquired by Africaonline (headquartered in London and Nairobi)[300] and resold to Marwan in 2004.[301]

Egypt's three private wireless companies, Mobinil, Vodafone, and Etisalat, propelled themselves into the DSL market through acquisition of four out of the eight main class A and B ISPs in Egypt. Although their operations remain under separate entities, this is expected to change with the advent of bundling and triple play licenses on ↳

p. 923

p. 924

↳ offer by the NTRA. This adds another dimension to media convergence (Graph 29.8).

Graph 29.8

Internet Service Provider Concentration

Internet Service Provider Concentration

Conclusion

Similar to broadcast, the indirect control of the ISP industry by the government comes through infrastructure ownership, despite opening up the market for investors to capitalize on this infrastructure. It is through this arrangement that the government owns the figurative "kill switch." As events culminated in the January 25 revolution, the government shut down the Internet it has been promoting and developing over the past decade. This was mainly done through the State Security apparatus pressuring large ISPs to physically switch off all domestic Internet supply. Again, this is a case where the government exerted political pressure. Unfortunately, this was done in compliance with Article 67 of the Telecommunications Law, which grants the government the right to "subject to their administration all telecommunication services and networks of any operator or service provider," when deemed necessary for national security. This lawreflects the heavy hand of the regime on communication and media in general.[302]

Search Engines

International players dominate the search engine market in Egypt with Google leading the market with over 90% market share from 2009 to 2011, and all other search engines (Bing, Yahoo, Ask Jeeves, etc.) competing for the remaining traffic. This includes Arabized search engines, such as Yahoo's Maktoob (Table 29.12; Graph 29.9).[303]

Table 29-12. Search Engine Concentration

Search Engines					
Market Shares (%)	**2004**	**2008**	**2009**	**2010**	**2011**
Google (Private, USA)			93.0	95.0	97.0
Others (Yahoo, Bing, maktoob, ask.com)			7.0	5.0	3.0
Monthly Search Volume (million access)					
Revenue Estimates (mil $)		9.0	45.0		
C1			93.0	95.0	97.0
HHI			8,649	9,025	9,409
Noam Index			8,649	9,025	9,409
Number of players (*n*)			1	1	1

Source: Figures obtained from Wael Fakharany, Regional Head for Google Middle East.

Graph 29.9

Search Engine Concentration

Search Engine Concentration

Online News Media Summary

Online interfaces for news have been widely proliferating in Egypt as part of the Internet boom and an increased appetite for news consumption after the revolution of January 25, 2011. Two main types of news websites have been sprawling. One is solely based on an online presence through fully fledged portals that include text and multimedia content, as well as interactive content built around engagement with online
p. 925 social media users. The other is based on portal ↳ projects embedded in bigger mainstream journalism outlets. The latter are usually created by mainstream media because of the dire need to invest in web-based projects that provide more current information at a lower price than printed news.

Islam Online belongs to the first category as it was one of the first news websites, funded by the government of Qatar and with no activities other than online. Similarly, *AlYoum7* started exclusively as a digital project. Only recently did it move to printing a daily paper. *Masrawy* is a third example of a purely web-based news website with high traffic. This model helped news organizations to create a culture of a digital newsroom and circumvent problems in the print industry such as distributing and printing through Al Ahram.

The second group includes websites affiliated with major media outputs, particularly print outlets. In this arena, both state-run newspapers have invested in fully fledged website projects such as *Al Ahram's* portal, as well as private enterprises such as *Al Masry Al Youm*. Television channels also make use of digital platforms, particularly YouTube. Poor Internet connections get in the way of high-quality streaming, which undermines the proliferation of online news videos. ONTV's YouTube channel is very successful because its content is spread virally and solicits feedback.

p. 926

The biggest obstacle for news websites is that advertising and commercial revenue is very limited. Most online news media starts as a complement to an actual physical project, and online news advertisements become part of the package of advertising in both print and online. In advertisement contracts, there are two quotations for print and online. Therefore, the traditional media outlets that monopolize advertising revenues in print will get to monopolize online revenues on websites. The cost of online advertising is based on impressions. After an ad reaches the target impressions online, it gets removed. Many agree that a business model of a pure digital media enterprise is yet to be found.[304]

The term "digital media" includes websites and mobile phone applications as well as SMS services that are becoming a large part of the industry. Digital development strategies are relatively new in media organizations. While some organizations invest in creating digital development positions, the norm is that online news media efforts are sporadic and not systematically, nor sequentially, planned.[305]

Information about ratings, traffic, and ad revenues from these different websites are difficult to find. There is an issue with transparency in this industry, as no independent institution exists that is in charge of and able to collect and audit market indicators for the different online news sites. State and private companies alike fail to provide information on their operations. Real circulation and traffic figures are concealed in order to amass greater advertising revenues.[306]

Internet Media

Internet Service Providers (ISP)

TE leases out wholesale services to ISPs as well as wireline and wireless companies.[280] The Egyptian ISP market is open to the private sector, with the number of ISPs amounting to 220[281] companies in 2010. Nonetheless, Internet penetration rates are markedly low (Table 29.9). Low Internet consumption in Egypt, especially relative to telecom-related industries, may be due to high poverty rates, low literacy levels, and inadequate infrastructure in certain geographical areas.[282]

Table 29-9. Internet Industry Indicators

Industry Indicator	2009	2010	2011 (Oct)
Internet penetration (Users per 100 Inhabitants)	22%	29%	34%
Proportion of households using a computer	44%	44%	48%
Proportion of individuals using a computer from any location in last 12 months	24%	26%	32%

Source: Egypt ICT Indicators: Infrastructure and Access Portal, Ministry of Communications and Information Technology (MCIT). "Key Indicators." Egypt ICT Indicators. May 2010. Last accessed on Dec. 15, 2011 at <http://www.new.egyptictindicators.gov.eg/en/Indicators/_layouts/KeyIndicatorsViewer.aspx>.

ISPs in Egypt are divided into class A, B, and C licenses. Class A licenses have the right to own their own infrastructural equipment as well as rights to international gateways through TE. They can thus provide wholesale services to class B and C ISPs.[283] Class B ISPs retain the right to infrastructure equipment, but gain access to international gateways through class A members. Class C ISPs can only partake in retail Internet services and lease out infrastructure from class A and B organizations. However, all ISPs, lease out the fiber optic cables from TE. Only four ISPs possess class A licenses: TEData, Nile Online, Linkdotegypt and Egynet[284]; another four retain class B licenses: Raya, YallaMisr, Noor, and Menanet.[285] For the purpose of this chapter the analysis addresses the retail market for class A and B ISPs. Market shares are calculated by the total number of subscribers per ISP (including indirect subscribers from class C ISPs, eliminating any duplicates).

The data set for this analysis is only for fixed-line broadband (i.e., DSL services). Cable television based on broadband or FTTX does not exist commercially. However, trials have been made. The reason for the absence of broadband-based cable TV is a lack of competition by cable operators to pursue this sector. Triple play licenses were issued by NTRA in 2009 that allow cable television, Internet, and telephone over a single-access broadband connection. LinkdotEgypt and Tivotech obtained the licenses; however, both licenses have
p. 921 been dormant.[286] ↳ The license does not include wireless broadband USB subscriptions or mobile Internet. Mobinil, Vodafone, and Etisalat are the only providers of wireless broadband services. Nonetheless, their recent acquisition in the fixed line market is addressed in the chapter, as it bears implications on ownership and concentration of ISPs in Egypt.

History and Regulation

The Internet was introduced into Egypt in 1993 by the Information Decision Support Center that granted exclusive services to Egyptian universities to connect with the European Academic Research Network for academic purposes.[287] Ever since, the government and the MCIT have taken quick and concrete steps to propel Egypt into the digital scene. In 1996, the government had further developed the infrastructural backbone for the Internet in order to officially open the data services door to private investors.[288] After 1998, broadband services gained ground and DSL connections were later introduced in 2002.[289]

The NTRA announced the Free Internet Initiative in 2002 in an effort to increase penetration levels through
p. 922 allowing Internet users ↳ access priced at the rate of a regular telephone call instead of charging subscription fees (Table 29.10).[290] ISPs abided by a revenue-sharing model in which TE, the sole telephone landline provider, received a 30% share of revenues from "Internet calls" and the licensed ISP retained the remaining 70%.[291] This initiative succeeded in increasing penetration levels. This was followed by the broadband initiative in 2004, with a goal of transforming Egypt into an "information society" under the umbrella of the e-access program.[292]

Table 29-10. TE DATA Home ADSL Price List (EGP) for Unlimited Access

Speed (Kbps)	1 Month	3 Months	6 Months	12 Months
512	95	280	555	1,090
1,024	140	415	820	1,610
2,048	220	650	1,290	2,530
4,096	380	1,125	2,230	4,380
8,192	695	2,055	4,020	8,000
16,384	1,355	4,010	7,845	15,600
24,576	1,950	5,770	11,310	22,500

Source: TE Data. "Home ADSL Price List." TE DATA 2012. Last accessed Jan. 5, 2012 at <http://www.tedata.net/eg/en/Home-ADSL/Home-ADSL-Prices-List>.

Ownership

Only class A ISPs are licensed to build their own infrastructure. TEData is the leading ISP in Egypt and is a subsidiary of TE. It held 70% of the infrastructure capacity in Egypt and 61% of the DSL market share in 2009.[293] TEData is also active in Jordan.[294] Vodafone gradually acquired Raya; a class B licensed ISP ranked in the top five largest ISPs by market share, raising its stake in Raya from 51% in 2006 to 97% in 2008.[295] Etisalat Egypt closely followed suit and acquired all shares of Egynet and Nile Online (both previously partly owned by TE).[296]

Mobinil was last to enter the DSL market and acquired Linkdotnet from Orascom Telecom Holding, which had the second largest market share after TEData, in 2010 (Table 29.11). Linkdotnet was established in 1995 and is owned by Orascom Telecom Holding.[297] It operates in the Middle East and Asia with offices in the UAE, Saudi Arabia, Algeria, and Pakistan.[298]

Table 29-11. Internet Service Provider Concentration

Internet Service Providers								
Market Shares by Subscribers (%)	**2004**	**2005**	**2006**	**2007**	**2008**	**2009**	**2010**	**2011**
Telecom Egypt/TE (Public) TEData		30.0	44.3	52.0	59.0	60.7	62.9	63.0
LinkdotNet (Private, Orascom Telecom Holding OTH, Egypt)					30.2	28.0	N/A	N/A
EgyNet (Private, Egypt)					N/A	N/A	N/A	N/A
Nile Online (also known as the Egyptian Company for Internet and Digital Infrastructure) (Private, Egypt)					N/A	N/A	N/A	N/A
YallaMisr (Kuwait, Al Kharafi)					0.7	0.2	0.3	0.3
Noor					0.5	0.4	0.5	0.5
Mena Net (Private, Egypt, Gamal Marwan)					0.1	0.0	0.0	0.0
Vodafone Egypt (UK) Vodafone (previously Raya)(Private, UK)					1.9	3.8	6.0	8.0
Etisalat U.A.E. (Public/Private, U.A.E.) Etisalat Misr (Public/Private, UAE)					7.7	6.7	5.7	5.8
Mobinil (Orascom, France Telecom, France)					N/A	N/A	24.4	22.5
Others		70	55.7	48	0	0.2	0.2	0
Revenue Estimates (mil $)	280.0				591.0			
C4					98.7	99.2	99.0	99.2
HHI					4,453	4,532	4,620	4,570
Noam Index					2,226	2,266	2,310	2,285
Number of players (*n*)					4	4	3	4

Source: Figures obtained from Ministry of Communications and Information Technology (MCIT).

Note: This is only for ADSL (fixed line) service providers and does not include wireless broadband. On the wireless broadband front, there is only Vodafone, Mobinil and Etisalat, TE Data are not in that market.

Note 2: For GSM (wireless broadband) Wael Fakharny said that out of 1.5 m lines Etisalat, Vodafone, and Mobinil have 47%, 40%, and 13%, respectively for 2011.

The remaining three companies are YallaMisr, Noor, and Menanet. YallaMisr is owned by a Kuwaiti conglomerate, Al Kharafi Group.[299] Even after diligent research, we have not reached any conclusions on Noor's ownership. Menanet was originally owned by Gamal Marwan, chief executive officer of Menanet, when it was established in 1999. In 2001, it was acquired by Africaonline (headquartered in London and Nairobi)[300] and resold to Marwan in 2004.[301]

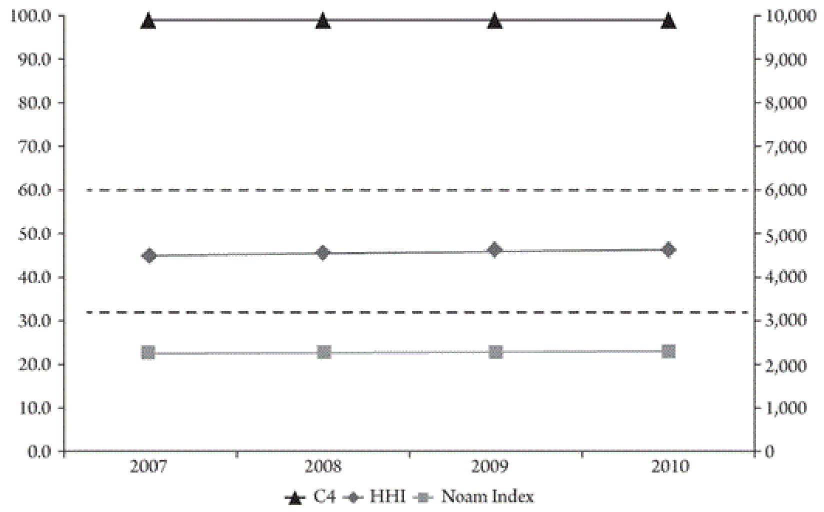
Egypt's three private wireless companies, Mobinil, Vodafone, and Etisalat, propelled themselves into the DSL market through acquisition of four out of the eight main class A and B ISPs in Egypt. Although their operations remain under separate entities, this is expected to change with the advent of bundling and triple play licenses on ↳

p. 923

p. 924 ↳

offer by the NTRA. This adds another dimension to media convergence (Graph 29.8).

Graph 29.8



Internet Service Provider Concentration

Conclusion

Similar to broadcast, the indirect control of the ISP industry by the government comes through infrastructure ownership, despite opening up the market for investors to capitalize on this infrastructure. It is through this arrangement that the government owns the figurative "kill switch." As events culminated in the January 25 revolution, the government shut down the Internet it has been promoting and developing over the past decade. This was mainly done through the State Security apparatus pressuring large ISPs to physically switch off all domestic Internet supply. Again, this is a case where the government exerted political pressure. Unfortunately, this was done in compliance with Article 67 of the Telecommunications Law, which grants the government the right to "subject to their administration all telecommunication services and networks of any operator or service provider," when deemed necessary for national security. This lawreflects the heavy hand of the regime on communication and media in general.[302]

Search Engines

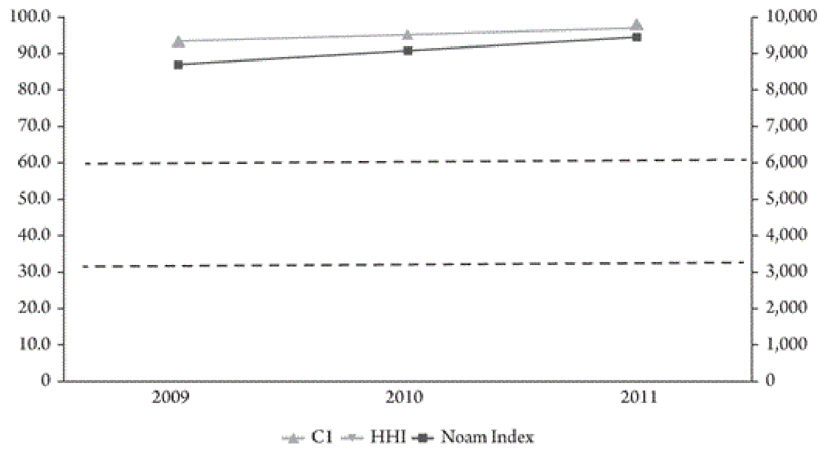
International players dominate the search engine market in Egypt with Google leading the market with over 90% market share from 2009 to 2011, and all other search engines (Bing, Yahoo, Ask Jeeves, etc.) competing for the remaining traffic. This includes Arabized search engines, such as Yahoo's Maktoob (Table 29.12; Graph 29.9).[303]

Table 29-12. Search Engine Concentration

Search Engines					
Market Shares (%)	**2004**	**2008**	**2009**	**2010**	**2011**
Google (Private, USA)			93.0	95.0	97.0
Others (Yahoo, Bing, maktoob, ask.com)			7.0	5.0	3.0
Monthly Search Volume (million access)					
Revenue Estimates (mil $)		9.0	45.0		
C1			93.0	95.0	97.0
HHI			8,649	9,025	9,409
Noam Index			8,649	9,025	9,409
Number of players (*n*)			1	1	1

Source: Figures obtained from Wael Fakharany, Regional Head for Google Middle East.

Graph 29.9



Search Engine Concentration

Online News Media Summary

Online interfaces for news have been widely proliferating in Egypt as part of the Internet boom and an increased appetite for news consumption after the revolution of January 25, 2011. Two main types of news websites have been sprawling. One is solely based on an online presence through fully fledged portals that include text and multimedia content, as well as interactive content built around engagement with online
p. 925 social media users. The other is based on portal ↳ projects embedded in bigger mainstream journalism outlets. The latter are usually created by mainstream media because of the dire need to invest in web-based projects that provide more current information at a lower price than printed news.

Islam Online belongs to the first category as it was one of the first news websites, funded by the government of Qatar and with no activities other than online. Similarly, *AlYoum7* started exclusively as a digital project. Only recently did it move to printing a daily paper. *Masrawy* is a third example of a purely web-based news website with high traffic. This model helped news organizations to create a culture of a digital newsroom and circumvent problems in the print industry such as distributing and printing through Al Ahram.

The second group includes websites affiliated with major media outputs, particularly print outlets. In this arena, both state-run newspapers have invested in fully fledged website projects such as *Al Ahram's* portal,
p. 926 as well as private enterprises such as *Al Masry Al Youm*. Television channels ↳ also make use of digital platforms, particularly YouTube. Poor Internet connections get in the way of high-quality streaming, which undermines the proliferation of online news videos. ONTV's YouTube channel is very successful because its content is spread virally and solicits feedback.

The biggest obstacle for news websites is that advertising and commercial revenue is very limited. Most online news media starts as a complement to an actual physical project, and online news advertisements become part of the package of advertising in both print and online. In advertisement contracts, there are two quotations for print and online. Therefore, the traditional media outlets that monopolize advertising revenues in print will get to monopolize online revenues on websites. The cost of online advertising is based on impressions. After an ad reaches the target impressions online, it gets removed. Many agree that a business model of a pure digital media enterprise is yet to be found.[304]

The term "digital media" includes websites and mobile phone applications as well as SMS services that are becoming a large part of the industry. Digital development strategies are relatively new in media organizations. While some organizations invest in creating digital development positions, the norm is that online news media efforts are sporadic and not systematically, nor sequentially, planned.[305]

Information about ratings, traffic, and ad revenues from these different websites are difficult to find. There is an issue with transparency in this industry, as no independent institution exists that is in charge of and able to collect and audit market indicators for the different online news sites. State and private companies alike fail to provide information on their operations. Real circulation and traffic figures are concealed in order to amass greater advertising revenues.[306]

Conclusion

The evolution of regulations and power politics to engineer ownership underlies the configuration of the media ecosystem in Egypt. Although the contemporary media landscape in Egypt has become more dynamic within the last decade, government involvement is a cornerstone to the development, or lack thereof, of each sector. The extent to which the state inhibits or encourages private sector participation in media is contingent upon the power of each medium to mobilize public opinion. Accordingly, industries such as telecommunications were allowed to become more market oriented and open to private sector participation. On the other hand, tight reins were kept on audiovisual media, with private sector entry prohibited until the inauguration of the free media zone in 2000. Even with private participation in mass media, ownership trends and content are restricted to a select few.

As in other Arab countries, Egypt's policies demonstrate a clear divide between economic and political freedoms, which in turn cause economic and political concentration. In a typical Arab regime manner, Egypt focused on encouraging economic freedoms in the strictest neoclassical sense while simultaneously continuing to harshly stifle political freedoms. Despite a heralded move toward market liberalization and private participation, contradictory policies have been noted to stifle these economic currents.

This was reflected in the fast pace of Internet and telephone connectivity within policies encouraged to promote economic freedoms and foreign investments. Ironically, such digital connectivity gave way to a generation of savvy political activists that eventually played a strong role in toppling the Mubarak regime. They remain actively engaged in fighting the current military rule. Nonetheless, despite accomplishments in facilitating the spread of information and communications technologies, government surveillance and censorship on ICT activities have increased.

Government surveillance was not only inflicted on individuals. Among the most disconcerting evidence of political repression is the government's iron clad rule of private enterprise. Vodafone revealed in 2009 that
p. 927 Egyptian ↳ authorities had obtained communications data from their organization after the April 2008 bread riots and convicted 22 people by December in connection with these protests.[307] Egypt's black out during the January 25 revolution was an affirmation of the force of politics on economic, organizational, and individual freedoms. It is not surprising that Egypt fared relatively well on indices of business success, but it performed dismally on democracy and freedom indices. Whenever freedom of expression was in question, political reign overruled economic expansion, bringing in political concentration as an additional dimension of media concentration.

In addition to direct surveillance and censorship, the state indirectly influenced media diversity and content. Of particular interest has been the role of businessmen as an additional source of control over media, especially in the case of newspapers and satellite TV. These businessmen were generally aligned with the ruling regime of Egypt, or were themselves members of the royal families of Saudi Arabia and Qatar. This impacts content in a manner that enhances the political concentration of the regimes. Indeed, with Egypt going through the growing pains of a hopeful democracy, both Saudi Arabia and Qatar have been trying to play pivotal roles in the region's politics. Such change in the geopolitical scene in the Arab world will have considerable ramifications on the state of the media in the region and in Egypt.

The months following Egypt's revolution of January 25, 2011, witnessed a series of turbulent actions as Egypt stood at the crossroads of shedding the old regime and moving on to a new era. There were some initial indicators of a loosening of the reins on freedom of expression and the promotion of a political openness to match the consistent drive toward economic openness. Matching political freedom to economic freedom was never on Mubarak's agenda, be considered one of the tests for a successful transition to democracy.

Conclusion

The evolution of regulations and power politics to engineer ownership underlies the configuration of the media ecosystem in Egypt. Although the contemporary media landscape in Egypt has become more dynamic within the last decade, government involvement is a cornerstone to the development, or lack thereof, of each sector. The extent to which the state inhibits or encourages private sector participation in media is contingent upon the power of each medium to mobilize public opinion. Accordingly, industries such as telecommunications were allowed to become more market oriented and open to private sector participation. On the other hand, tight reins were kept on audiovisual media, with private sector entry prohibited until the inauguration of the free media zone in 2000. Even with private participation in mass media, ownership trends and content are restricted to a select few.

As in other Arab countries, Egypt's policies demonstrate a clear divide between economic and political freedoms, which in turn cause economic and political concentration. In a typical Arab regime manner, Egypt focused on encouraging economic freedoms in the strictest neoclassical sense while simultaneously continuing to harshly stifle political freedoms. Despite a heralded move toward market liberalization and private participation, contradictory policies have been noted to stifle these economic currents.

This was reflected in the fast pace of Internet and telephone connectivity within policies encouraged to promote economic freedoms and foreign investments. Ironically, such digital connectivity gave way to a generation of savvy political activists that eventually played a strong role in toppling the Mubarak regime. They remain actively engaged in fighting the current military rule. Nonetheless, despite accomplishments in facilitating the spread of information and communications technologies, government surveillance and censorship on ICT activities have increased.

Government surveillance was not only inflicted on individuals. Among the most disconcerting evidence of political repression is the government's iron clad rule of private enterprise. Vodafone revealed in 2009 that p. 927 Egyptian ↳ authorities had obtained communications data from their organization after the April 2008 bread riots and convicted 22 people by December in connection with these protests.[307] Egypt's black out during the January 25 revolution was an affirmation of the force of politics on economic, organizational, and individual freedoms. It is not surprising that Egypt fared relatively well on indices of business success, but it performed dismally on democracy and freedom indices. Whenever freedom of expression was in question, political reign overruled economic expansion, bringing in political concentration as an additional dimension of media concentration.

In addition to direct surveillance and censorship, the state indirectly influenced media diversity and content. Of particular interest has been the role of businessmen as an additional source of control over media, especially in the case of newspapers and satellite TV. These businessmen were generally aligned with the ruling regime of Egypt, or were themselves members of the royal families of Saudi Arabia and Qatar. This impacts content in a manner that enhances the political concentration of the regimes. Indeed, with Egypt going through the growing pains of a hopeful democracy, both Saudi Arabia and Qatar have been trying to play pivotal roles in the region's politics. Such change in the geopolitical scene in the Arab world will have considerable ramifications on the state of the media in the region and in Egypt.

The months following Egypt's revolution of January 25, 2011, witnessed a series of turbulent actions as Egypt stood at the crossroads of shedding the old regime and moving on to a new era. There were some initial indicators of a loosening of the reins on freedom of expression and the promotion of a political openness to match the consistent drive toward economic openness. Matching political freedom to economic freedom was never on Mubarak's agenda, be considered one of the tests for a successful transition to democracy.

Works Cited

Abdel Fattah, Amira. *Press Freedom in Egypt*. MA dissertation, The American University in Cairo, 2008.

Abdel Hafez, Fatma H.M., and Wahba, Khaled (2004). "Assessment of the 'Free Internet Access' Project on the Internet Market in Egypt: System Dynamics View." Presented at *Systems Dynamics Society Conference*. Oxford, England, July 25–29, 2004. Last accessed Jan. 5, 2011 at <http://www.systemdynamics.org/conferences/2004/SDS_2004/PAPERS/276WAHBA.pdf>.
WorldCat

Abou Hatab, Fathy. *Personal interview.* May 16, 2012.
Google Scholar Google Preview WorldCat COPAC

Africa Telecom. *Information Gatekeepers Inc*., 2:3, March 2001.
Google Scholar Google Preview WorldCat COPAC

Al Ahram. "About Us." *Al Ahram*. Last accessed on May 29, 2012 at <http://english.ahram.org.eg/UI/Front/Aboutus.aspx>.
WorldCat

"Al Ahram Establishment Websites." *Al Ahram International North America Inc*. *Limited*. Last accessed on Jan. 16, 2012 at <http://aina.ahram.org.eg/Ahram %20USA%5COnline%20 Ads%5CAl-Ahram%20 Websites.pdf>.
WorldCat

Al Bawaba. "Click to Become IPO in Egypt." *Al Bawaba News*. May 2, 2001. Last accessed on Dec. 18, 2011 at <http://www.albawaba.com/news/click-gsm-become-ipo-egypt>.
WorldCat

"Al Dustour." *The Media Briefing*. Last accessed on Jan. 16, 2012 at <http://www.themediabriefing.com/products/Al dustour/>.
WorldCat

Al Gomhouriyya Newspaper, Last accessed on July 5, 2012 at <http://www.algomhuria.net.eg/algomhuria/today/pdf/>.
WorldCat

"Al Jazeera Closed for Operating Unlicensed, Sawiris Considers Qatar-based Channel." *Egypt Independent*. July 5, 2012. Al Mary Al Youm. Last accessed on Jan. 17, 2012 at <http://www.almasryalyoum.com/en/node/496619>.
WorldCat

Al Jazeera. "Corporate Profile." *Al Jazeera*. Last accessed Dec. 29, 2011 at <http://www.aljazeera.com/aboutus/2006/11/2008525185555444449.html>.
WorldCat

Allam, Rasha. "Media Landscape: Egypt." *European Journalism Centre*. Nov. 8, 2010. Last accessed on Dec. 29, 2011 at <http://www.ejc.net/media_landscape/article/egypt/>.
WorldCat

Al Masry Al Youm. "About Al Masry Al Youm." *Al Masry Al Youm*. Last accessed on Jan. 16, 2012 at <http://www.almasryalyoum.com/en/node/54>.
WorldCat

p. 928 "Al Masry Al Youm: Transforming the Egyptian Press." *Tavaana*. Media Monitor. 28 Jan. 2011. Last accessed on Jan. 16, 2012 at <http://www.tavaana.org/archive.jsp?restrictids=nu_repeatitemid&restrictvalues=2071502000341295552773910&lang=en>.
WorldCat

Al Rai Media Group. "Al Rai Media Group." *Al Rai Media Group*. Last accessed on June 27, 2012 at <http://www.alraimedia.com/Alrai/MediaGroup.aspx>.
WorldCat

"Al Sayed Al Badawy." *Ahram Online*. 19 Nov. 2011. Last accessed on Jan. 16, 2012 at <http://english.ahram.org.eg/NewsContent/33/102/26705/Elections-/Whos-who/AlSayed-AlBadawi.aspx>.
WorldCat

Al Wafd. *Official Website*. Last accessed on June 27, 2012 at <http://www.alwafd.org/digital/>.
WorldCat

Amin, Hussein. *Strengthening the Rule of Law and Integrity in the Arab World: Report on the State of the Media in Egypt*. The Arab Center for the Development of the Rule of Law and Integrity, 2009, 6. Last accessed on June 10, 2012 at <http://www.arabruleoflaw.org/Files/PDF/Media/English/P2/Egypt_MediaReportP2_En.pdf>.
WorldCat

"An Overly French Mobinil." *Egypt Independent*, no. 4, June 7, 2012, 11. Last accessed on 27 June 2012 at <http://www.scribd.com/doc/96300554/Egypt-Independent-Jun-07>.
WorldCat

"Arab Radio and Television Network." *Wikipedia*. Sept. 21, 2011. Last accessed on Dec. 19, 2012 at <http://en.wikipedia.org/wiki/Arab_Radio_and_Television_Network>.
WorldCat

Arab Satellite Communications Organization. "About Us. Corporate Governance." *Arab Satellite Communications Organization*. Last accessed on June 27, 2012 at <http://www.arabsat.com/pages/ArabLeague.aspx>.
WorldCat

Attalah, Lina and Rizk, Nagla. "Egypt's Evolving Media Landscape: Access, Public Interest and Control," in *A New Frontier*, *An Old Landscape*. Report for the Ford Foundation, November 2011, 118–136. Last accessed on January 16, 2012 at <http://participatorymedia.lab.asu.edu/files/NewFrontierOldLandscape.pdf>.
WorldCat

Attia, Tarek. "No More Free TV." *Al Ahram Weekly*, no. 526. Mar. 22–28, 2001. Last accessed on May 14, 2012 at <http://weekly.ahram.org.eg/2001/526/li3.htm>.
WorldCat

Black, Jeffrey. "Egypt Press: More Free, Still Fettered." *Arab Media and Society*. 2008. Last accessed on Jan. 16, 2012 at <http://www.arabmediasociety.com/?article=572>.
WorldCat

Bureau of Democracy, Human Rights and Labor. *2010 Human Rights Report: Egypt*. U.S. Department of State, 2011. Last accessed on June 27, 2012 at <http://www.state.gov/documents/organization/160456.pdf>.
WorldCat

"Civil Movements: The Impact of Facebook and Twitter," in *Arab Social Media Report* (Vol 1, No. 2). Dubai School of Government, 2011, 16. Last accessed on Mar. 5, 2012 at <http://www.dsg.ae/en/Publication/Pdf_En/DSG_Arab_Social_Media_Report_No_2.pdf>.
WorldCat

Cochrane, Paul. "Saudi Arabia's Media Influence." *Arab Media and Society*. 2007. Last accessed on Jan. 17, 2012 at <http://www.arabmediasociety.com/?article=421> and <http://www.insightsmena.com/en/#!place=category&cat=Media+Usage>.
WorldCat

"Constitutional Declaration." *Cabinet*. Last accessed on Mar. 7, 2012 at <http://www.cabinet.gov.eg/AboutEgypt/Egyptian_constitution.aspx>.
WorldCat

"Control" in Hawtin, Dixie and Puddephatt, Andrew, eds. *A New Frontier*, *an Old Landscape*. New York: Ford Foundation, 2011, 118–136. Last accessed on Jan. 16, 2012 at <http://participatorymedia.lab.asu.edu/files/NewFrontierOldLandscape.pdf>.
WorldCat

Dubai Media Incorporated. "About Dubai Media Incorporated." *Dubai Media Incorporated*. Last accessed on June 27 2012 at <http://dmi.gov.ae/about_En.asp>.
WorldCat

"Egypt: Article 19 and the Justice Initiative Submission to the UN Universal Periodic Review" in the *Seventh Session of the UPR Working Group*. 2010. Last accessed on Jan. 16, 2012 at <http://www.article19.org/data/files/pdfs/submissions/egypt-article-19-and-the-justice-initiative-submission-to-the-un-universAl p.pdf>.
WorldCat

"Egypt Authorities Freeze New Satellite TV Station Licenses." *X Index*. 9 Sept. 2011. Last accessed on Jan. 16, 2012 at <http://www.indexoncensorship.org/2011/09/egypt-authorities-freeze-new-satellite-tv-station-licenses/>.
WorldCat

“Egypt Facebook Statistics.” *Social Bakers*. Last accessed on Mar. 5, 2012 at <http://www.socialbakers.com/facebook-statistics/egypt>.
WorldCat

“Egypt Major African Mobile Markets: Future Growth Prospects.” *Africa and Middle East Telecom Week*. Last accessed Jan. 18, 2012 at <http://www.africantelecomsnews.com/resources/AfricaOpp_Egypt.shtml>.
WorldCat

“Egypt.” *Press Freedom and Media Development*. Last accessed on Jan. 16, 2012 at <http://www.wan-press.org/pfreedom/articles.php?id=4404>.
WorldCat

Egypt: The National Report on Literacy and Adult Education. United Nations Educational, Scientific and Cultural Organization,
p. 929 2009. Last ↳ accessed on Dec. 19, 2011 at www.unesco.org/fileadmin/MULTIMEDIA/. . ./UIL/. . ./Egypt.pdf.
WorldCat

“Egypt.” *The World Factbook*. Last accessed on Mar. 7, 2012 at <https://www.cia.gov/library/publications/the-world-factbook/geos/eg.html>.
WorldCat

Egyptian Television Network. “About Us.” *Egyptian Television Network (ETN)*. Last accessed on Jan. 17, 2012 at <http://www.egytv.net/aboutus.aspx>.
WorldCat

El Azhary, Emad. *Personal interview.* Nov. 24, 2011.
Google Scholar Google Preview WorldCat COPAC

El Galad, Magdy. Interview. Al Nas TV. Last accessed on Jan. 16, 2012 at <http://www.youtube.com/watch?v=TSnLjXi2rdI>.
WorldCat

El Hefnawy, Magdi. *Personal interview.* June 30, 2011.
Google Scholar Google Preview WorldCat COPAC

ERTU. “Sectors.” *ERTU*. Last accessed on Dec. 15, 2011 at <http://ertu.org/1/sectors.asp>.
WorldCat

Etisalat. “About Us.” *Etisalat*. Last accessed on June 27, 2012 at <http://etisalat.com.eg/etisalat/Etisalat_Portal_En/about/corporate.htm?_pageid=42,1&_dad=portal&_schema=PORTAL&siteAlias=etisalat&sitePath=Etisalat_Portal_En&kpAlias=about&pageAlias=corporate>.
WorldCat

Etisalat. “Corporate Information.” *Etisalat*. Last accessed June 27, 2012 at <http://etisalat.com.eg/etisalat/Etisalat_Portal_En/about/corporate.htm?_pageid=42,1&_dad=portal&_schema=PORTAL&siteAlias=etisalat&sitePath=Etisalat_Portal_En&kpAlias=about&pageAlias=corporate>.
WorldCat

“Etisalat Led Group Signs $2.88b Deal.” *MENAFN*. 23 Aug. 2006. Last accessed on Jan. 4, 2011 at <https://www.menafn.com/qn_news_story_s.asp?StoryId=1093124586>.
WorldCat

“EtisalatMisr Acquires NOL and EgyNet.” *Arab Finance*. Oct. 27, 2008. Last accessed 8 Jan. 2012 at <https://www.arabfinance.com/News/newsdetails.aspx?Id=122348>.
WorldCat

Etisalat. “Our History.” *Etisalat*. Last accessed on June 27, 2012 at <http://etisalat.com/html/history.html>.
WorldCat

“Facebook Usage Factors and Analysis,” in *Arab Social Media Report* 1, no. 1. Dubai School of Government, 2011, 6. Last accessed on Mar. 5, 2012 at <http://unpan1.un.org/intradoc/groups/public/documents/dsg/unpan044212.pdf>.
WorldCat

Fahim, Joseph. “OTV Hits the Airwaves.” *Daily News Egypt*. Jan. 30, 2007. Last accessed on Dec. 26, 2011 at

<http://www.dailystaregypt.com/article.aspx?ArticleID=5308>.
WorldCat

Fakharany, Wael. *Email interview.* Sept. 14, 2011.
Google Scholar Google Preview WorldCat COPAC

Fakhredinne, Jihad. "Pan-Arab Satellite Television: Now the Survival Part." *Allied Media Corporation*. Last accessed on Jan. 17, 2012 at <http://www.allied-media.com/ARABTV/pan-arab-sat.htm>.
WorldCat

"False Freedom: Online Censorship in the Middle East and North Africa." *UNHCR: Human Rights Watch*. Nov. 15, 2005. Last accessed on Feb. 13, 2012 at <http://www.unhcr.org/refworld/docid/45cc445f2.html>.
WorldCat

Fandy, Mamoun. *(Un)Civil War of Words: Media and Politics in the Arab World*. Westport, CT: Praeger, 2007.
Google Scholar Google Preview WorldCat COPAC

Field, Nathan and Hamam, Ahmed. "Salafi Satellite TV in Egypt." *Arab Media and Society*. 2009. Last accessed on Jan. 18, 2012 at <http://www.arabmediasociety.com/?article=712>.
WorldCat

"Freedom of Expression Project: The Press in Egyptian Legislation" in *Middle East and Islamic Studies Collection*. Cornell University Library. Last accessed on Jan. 16, 2012 at <http://www.library.cornell.edu/colldev/mideast/egpress.htm>.
WorldCat

Full Text: Draft Egyptian Broadcast Law. Arab and Media Society, 2008, Article 1, Clause 4. Last accessed June 27, 2012 at <http://www.arabmediasociety.com/articles/downloads/20080729105525_AMS6_draft_media_law_english.pdf>.
WorldCat

"Gamal Marwan Buys 100 Per Cent of MenaNet Communications SAE (MenaNet) from The African Lakes Corporation plc (ALC)." *AME Info*. May 24, 2004. Last accessed on 12 Mar. 2012 at <http://www.ameinfo.com/40072.html>.
WorldCat

Good News Group. "Companies" *Good News Group*. Last accessed on Jan. 16, 2012 at <http://www.goodnewsgroup.com/>.
WorldCat

Good News Group. "Good News for Radio and TV." *Good News Group*. 2006. Last accessed on Jan. 16, 2012 at <http://www.goodnewsgroup.com/gng9.swf>.
WorldCat

GoodNews4Me. "Information." *GoodNews4Me*. Al Alam Al Youm. Last accessed on Jan. 16, 2012 at <http://www.gn4me.com/alalamalyoum/info.jsp?edition_id=3238>.
WorldCat

"Group Companies: Orbit Showtime Network." *KIPCO: Kuwait Projects Company (Holding)*. Last accessed on Jan. 17, 2012 at <http://www.kipco.com/GroupCompanies.asp?q_pageid=56>.
WorldCat

p. 930 Hagey, Keach. "News Corp Eyes Stake in Saudi Firm Rotana Media." *The National*. 2 Sept. 2009. Last accessed on Jan. 17, 2012 at ↳ <http://www.thenational.ae/business/media/news-corp-eyes-stake-in-saudi-firm-rotana-media>.
WorldCat

Hamdy, Naila. "A Dream TV Come True." *Transnational Broadcasting Studies (TBS)*, No. 8, (Spring 2002). Last accessed on Jan. 17, 2012 at <http://www.tbsjournal.com/Archives/Spring02/sirhan.html>.
WorldCat

Hamdy, Naila. "El Mehwar the Mercurial." *Transnational Broadcasting Studies (TBS)*. No. 9, (Fall/Winter 2002). Last accessed on Jan. 17, 2012 at <http://www.tbsjournal.com/Archives/Fall02/Mehwar.html>.
WorldCat

Hamdy, Naila. Personal interview. June 10, 2012.

Hamzawy, Amr and Dunne, Michele. "Media Freedom Restricted as Egyptian Parliamentary Elections Approach." *Carnegie Endowment for International Peace*. Last accessed on Jan. 17, 2012 at

<http://egyptelections.carnegieendowment.org/2010/10/25/media-freedom-restricted-as-egyptian-parliamentary-elections-approach>.
WorldCat

Hassanein, Leila. “Access to Infrastructure: Egypt.” *GISWatch*. 2008. Last accessed Dec. 22, 2010 at <http://www.giswatch.org/sites/default/files/Egypt_0.pdf>.
WorldCat

Hot Telecom. *Country profile: Egypt 2008*. Apr. 30, 2008. Last accessed on Jan. 8, 2012 at <http://www.hottelecoms.com/Egypt.pdf>.
WorldCat

Howard, P.N. “Ownership Diversity in Muslim Media Systems.” *World Information Access Project (WIA)*. Oct. 6, 2008. Last accessed on Jan. 16, 2012 at <http://www.wiaproject.org/index.php/68/ownership-diveristy-in-muslim-media-systems>.
WorldCat

“Human Resources Division.” *Al Jazeera Network*. Last accessed on June 27, 2012 at <http://recruitment.aljazeera.net/english/>.
WorldCat

“Industrial Conglomerates: Mawarid Group Company LLC.” *Bloomberg Businessweek*. Last accessed on Jan. 17, 2012 at <http://investing.businessweek.com/research/stocks/private/people.asp?privcapId=22595361>.
WorldCat

“Internet Filtering in Egypt.” *OpenNet Initiative*. Aug. 6, 2009. Last accessed on Feb. 13, 2012 at <http://opennet.net/sites/opennet.net/files/ONI_Egypt_2009.pdf>.
WorldCat

IREX. “Media sustainability Index 2005: Middle East and North Africa.” *IREX*. Last accessed on May 24, 2012 at <http://www.irex.org/system/files/MSI05_MENA_EG.pdf 26>.
WorldCat

Jaafar, A. “Mixed Results for LBC – Rotana: Arab Conglomerate Tries to Compete with MBC.” *Variety*. Oct. 2, 2008. Last accessed on Jan. 17, 2012 at <http://www.variety.com/article/VR1117993363>.
WorldCat

Karlekar, Karen D. and Cook, Sarah G., ed. *Freedom of the Press 2008: A Global Survey of Media Independence*. New York: Rowman and Littlefield Publishers, Inc. 2008, 121.
Google Scholar Google Preview WorldCat COPAC

Kassem, Hisham. *Personal interview.* 21 Feb. 2012.
Google Scholar Google Preview WorldCat COPAC

Kawach, Nadim. “Saudi Cleric Slams MBC over TV Series.” *Emirates 24/7*. Aug. 18, 2010. Last accessed on May 29, 2012 at <http://www.emirates247.com/entertainment/films-music/saudi-cleric-slams-mbc-over-tv-series-20102008-18-11.280816>.
WorldCat

Khalil, Joe. “News Television in the Arabian Gulf. . . Period of Transitions.” *Global Media Journal* 5, no. 8 (2004).
Google Scholar WorldCat

K&M Engineering and Consulting Corporation. “ARENTO Cost of Service Study.” *USAID*. National Telecommunications Organization & the U.S. Agency for International Development, 2011, 105. Last accessed on Dec. 19, 2011 at <http://pdf.usaid.gov/pdf_docs/PNABS218.pdf>.
WorldCat

Kotb, Ahmed. “Media Control.” *Al Ahram Weekly Online*, 1056, July 14–20, 2011. Last accessed on Jan. 17, 2012 at <http://weekly.ahram.org.eg/2011/1056/eg692.htm>.
WorldCat

Kotler, P and Armstrong, Gray, eds. “Pricing: Understanding and Capturing Customer Value.” In *Principles of Marketing*. New York: Pearson Prentice Hall, 2012. Last accessed on June 27, 2012 at <http://catalogue.pearsoned.co.uk/assets/hip/gb/hip_gb_pearsonhighered/samplechapter/0273752502.pdf>.
WorldCat

LinkdotNet. “News and Events.” *LinkdotNet*. Last accessed on June 27, 2012 at

<http://www.link.net/English/Linkcorp/News+and+Events/OTH-Logo.htm>.
WorldCat

Madany, Sherine. “Egypt Postpones Second Fixed Line Auction for a Year.” *Daily News Egypt*. Sept. 8, 2008. Last accessed on Dec. 19, 2011 at <http://www.dailystaregypt.com/article.aspx?ArticleID=16317>.
WorldCat

Mattar, Eman. “El Hefaz and El Nas TV Channels Halted on TV and El Faraeen Warned.” *Business Investment Banking News*. Dec. 12, 2010. Last accessed on Jan. 18, 2012 at <http://www.bibnews.com/en/news_details.php?id=5012>.
WorldCat

“MBC, Largest Media Group in the Middle East Chooses Magnolia as Strategic Platform.” *Magnolia*. Mar. 9, 2011. Last accessed on May 29, 2012 at <http://www.magnolia-cms.com/our-company/news/press-releases/mbc-usa.html>.
WorldCat

MCIT. *Ministry of Communications and Information Technology eProtal*. Last accessed on Nov. 29, 2011 at <http://www.mcit.gov.eg/TeleCommunications/Historical_Prespective>.
WorldCat

p. 931 MCIT. “Telecom Reform Milestones.” *Ministry of Communication and Information Technology*. Last accessed on Nov. 29, 2011 at <http://www.mcit.gov.eg/TeleCommunications/Telecom_Reform_Milestones>.
WorldCat

“Media Usage.” *Insights MENA*. 2010. Last accessed on Jan. 16, 2012 at <http://www.insightsmena.com/en/#!place=category&cat=Media+Usage>.
WorldCat

Mekay, Emad. “TV Stations Multiply as Egyptian Censorship Falls.” *The New York Times*. July 13, 2011. Last accessed on Jan. 16, 2012 at <http://www.nytimes.com/2011/07/14/world/middleeast/14iht-M14B-EGYPT-MEDIA.html?_r=2&pagewanted=all>.
WorldCat

Middle East Rating and Investors Service. “Egyptian Company for Mobile Services S.A.E (Mobinil).” Merisratings.com. November 2009. Last accessed Jan. 10, 2011 at <http://www.mobinil.com/Investors/FinancialReports/doc/CreditRatingReportNov092ndIssue.pdf>.
WorldCat

“Minister: Al Jazeera Mubasher Misr Shut Down for Disregarding Law.” *Al Masry Al Youm*. Sept. 12, 2011. Last accessed on Jan. 17, 2012 at <http://www.almasryalyoum.com/en/node/494878>.
WorldCat

Ministry of Communications and Information Technologies (MCIT). *Dataset*. Last accessed on July 5, 2012 at <http://www.mcit.gov.eg/Indicators/Ind_Communications.aspx>.
WorldCat

Ministry of Communications and Information Technology (MCIT). “ICT Infrastructure and Access.” *Egypt ICT Indicators*. Last accessed on Jan. 5, 2012 at <http://www.new.egyptictindicators.gov.eg/en/Indicators/_layouts/KeyIndicatorsViewer.aspx>.
WorldCat

Ministry of Communications and Information Technology (MCIT). “Key Indicators.” *Egypt ICT Indicators*. May 2010. Last accessed on Dec. 15, 2011 at <http://www.new.egyptictindicators.gov.eg/en/Indicators/_layouts/KeyIndicatorsViewer.aspx>.
WorldCat

Mobinil. “Annual Report 2010: Egyptian Company for Mobile Services (ECMS).” *Mobinil*. Last accessed on June 27, 2012 at <http://www.vmobinil.com/investors/AnnualReport2010.aspx>.
WorldCat

Monsef, Olfat A. “Pioneering Liberalization & Regulation of Telecommunications in The Arab Region.” *International Telecommunications Union*. November 2003. Last accessed on Mar. 12, 2012 at www.ituarabic.org/PreviousEvents/2003/reg/Doc7.ppt.
WorldCat

“Murdoch Buys into Rotana.” *Arab News*. Feb. 23, 2010. Last accessed on Dec. 19, 2011 at <http://arabnews.com/saudiarabia/article21517.ece>.
WorldCat

"Muslim Brotherhood to Launch Satellite TV Channel in April." *Al Masry Al Youm*. Mar. 12, 2011. <http://www.almasryalyoum.com/en/node/349787>.
WorldCat

Nasrawi, Saif. "Wafd Party President Buys Al Dustour Newspaper." *Al Masry Al Youm*. Aug. 23, 2010. Last accessed on Jan. 16, 2012 at <http://www.almasryalyoum.com/en/node/70155>.
WorldCat

National Telecom Regulatory Authority (NTRA). "About Us." *National Telecom Regulatory Authority*. Last accessed on Nov. 30, 2011 at <http://www.tra.gov.eg/english/DPages_DPagesDetails.asp?ID=180&Menu=5>.
WorldCat

National Telecom Regulatory Authority (NTRA). "About Us." *National Telecom Regulatory Authority (NTRA)*. Last accessed on June 27, 2012 at <http://www.tra.gov.eg/english/DPages_DPagesDetails.asp?ID=180&Menu=5>.
WorldCat

National Telecom Regulatory Authority (NTRA). "Broadband: The Speedy Access." *National Telecom Regulatory Authority*. Last accessed on Dec. 15, 2011 at <http://www.tra.gov.eg/presentations/broadband_En.pdf>.
WorldCat

National Telecom Regulatory Authority (NTRA). "Consumer Protection: 'Know Your Rights' Awareness Campaign." *National Telecom Regulatory Authority*. Apr. 20, 2010. Last accessed on June 27, 2012 at <http://www.tra.gov.eg/english/dpages_dpagesdetails.asp?ID=469>.
WorldCat

National Telecom Regulatory Authority (NTRA). "Media Convergence Issues in Egypt and the Region and Prospects for the Future." *Scribd*. 2009. Last accessed Nov. 27, 2011 at www.scribd.com/doc/38482708/Doc9-NTRA.
WorldCat

National Telecom Regulatory Authority (NTRA). "Mobile Number Portability Guidelines." *National Telecom Regulatory Authority*. 2008. Last accessed on Dec. 15, 2011 at <http://www.tra.gov.eg/Presentations/NumberPotabilityConsumersGuide24032008_En.pdf>.
WorldCat

National Telecom Regulatory Authority (NTRA). "Telecom Law." *National Telecom Regulatory Authority*. Last accessed on June 4, 2012 at <http://www.tra.gov.eg/uploads/law/law_en.pdf>.
WorldCat

National Telecom Regulatory Authority (NRTA). "The NTRA Offering the Second Fixed-Line License." *National Telecommunications Regulatory Authority*. Last accessed on Dec. 19, 2011 at <http://www.tra.gov.eg/english/news_newsdetails.asp?PID=36&ID=129>.
WorldCat

"News Media in Egypt." *Press Reference*. Last accessed on Jan. 8, 2012 at <http://www.pressreference.com/Co-Fa/Egypt.html>.
WorldCat

p. 932 *Newspaper readership study 2002–2010*. Pan Arab Research Center (PARC), 2011.
Google Scholar Google Preview WorldCat COPAC

Nile Engineering Group. Last accessed on June 10, 2012 at <http://www.nileengineering.com/English/Products--and--Services/NileTel-Stores>.
WorldCat

NileSat. "Nilesat Company Profile." *NileSat*. Last accessed on June 27, 2012 at <http://nilesat.com.eg/banners/AboutUs/CompanyProfile.aspx>.
WorldCat

Nile Television Network (NTN). Last accessed on June 27, 2012 at <http://www.ntntv.net/>.
WorldCat

"NTRA Says Finding Local Partner in Mobinil Mandatory." *Arab Finance Brokerage Company*. Dec. 16, 2009. Last accessed Jan. 10, 2012 at <http://www.arabfinance.com/news/newsdetails.aspx?id=157214>.
WorldCat

Office of the United Nations High Commissioner for Human Rights. "International Covenant on Civil and Political Rights." *United Nations Human Rights*. Last accessed on Jan. 17, 2012 at <http://www.ohchr.org/EN/Pages/WelcomePage.aspx>.
WorldCat

Orascom Telecom. "Our History." *Orascom Telecom*. Last accessed on June 27, 2012 at <http://www.orascomtelecom.com/about/Contents/default.aspx?ID=395>.
WorldCat

Penal Code No. 58 of 1937 [Egypt]. August 1937. Last accessed on Mar. 7, 2012 at <http://www.unhcr.org/refworld/docid/3f827fc44.html>.
WorldCat

"Presidential Decree No. 313/1956, Amended by Law 14/1967." *United Group: Attorneys at Law*, *Legal Researcher and Human Rights Advocates*. Last accessed on Jan. 16, 2012 at <http://ug-law.com/index.php?option=com_content&view=article&id=424%3ApresidentiAl decree-no-3131956-amended-by-law-no-141967-&catid = 64%3Amedia-laws&Itemid = 89&lang = en>.
WorldCat

"Press Freedom Index 2011–2012." *Reporters Without Borders*. Last accessed on June 4, 2012 at <http://en.rsf.org/spip.php?page=classement&id_rubrique=1043>.
WorldCat

"Press Freedom Index Images of Press Freedom Index 2007–2012." *Explow News*. Last accessed on June 4, 2012 at <http://explow.com/Press_Freedom_Index%20images%20of%20press%20freedom%20index%202007-202012>.
WorldCat

"Press Releases." *Pehla: Premium Asian Entertainment*. Last accessed on Jan. 17, 2012 at <http://www.pehlatv.net/pehla/PressReleases/54/ADD-launches-Hallmark-channel-on-its-platform>.
WorldCat

"Radio Masr." *Facebook Page*. Last accessed on Jan. 17, 2012 at <http://www.facebook.com/RadioMasr?sk=info>.
WorldCat

Ramadan, Amr. "Egypt to Sign Triple-play Licenses, Says Kamel at Euromoney." *Daily News Egypt*. Sept. 30, 2010. Last accessed on July 5, 2012 at <http://www.thefreelibrary.com/Egypt+to+sign+triple-play+licenses,+says+Kamel+at+Euromoney.-a0238670369>.
WorldCat

Rao, Madanmohan. *Mobile Africa Report 2011: Regional Hubs of Excellence and Innovation*. MobileMonday, 2011. Last accessed on Jan. 18, 2012 at <http://www.mobilemonday.net/reports/MobileAfrica_2011.pdf>.
WorldCat

Reuters. "Egypt to Auction 2nd Fixed-line License on June 19." *Balancing Act Africa*, no. 394. Last accessed on Jan. 4, 2012 at <http://www.balancingact-africa.com/news/en/issue-no-394/telecoms/egypt-to-auction-2nd/en>.
WorldCat

Rizk, Nagla. "Stories from Egypt's Music Industry: De Facto Commons as Alternative to Copyright" in Rizk, Nagla and Shaver, Lea, eds. *Access to Knowledge: New Research on Intellectual Property and Development*. Bloomsbury Academic, 2010, 103. Last accessed on May 29, 2012 at <http://www.aucegypt.edu/Business/A2K4D/Documents/A2KEgypt.pdf>.
WorldCat

"Rotana Launches Egyptian General Entertainment Channel." June 1, 2011. *Arab News*. Last accessed on July 5, 2012 at <http://mediame.com/news/broadcasting_news/rotana_launches_egyptian_general_entertainment_channel>.
WorldCat

Rugh, William. A. *Arab Mass Media: Newspapers, Radio & Television in Arab Politics*. Westport, CT: Praeger, 2004.
Google Scholar Google Preview WorldCat COPAC

Sahota, Dawinderpal. "France Telecom Increases Stake in Egypt's Mobinil." Telecoms.com, Feb. 13, 2012. Last accessed on July 27, 2012 at <http://www.telecoms.com/tag/mobinil/>.
WorldCat

Sakr, Naomi. *Arab Television Today*. New York: I. B. Tauris, 2007.
Google Scholar Google Preview WorldCat COPAC

Sakr, Naomi. *Satellite Realms: Transnational Television, Globalization and The Middle East*. New York: I.B. Tauris, 2001.
Google Scholar Google Preview WorldCat COPAC

Sakr, Naomi. "Satellite Television and Development in the Middle East." *Middle East Research and Information Project 2010*. Last accessed on May 29, 2012 at <http://www.merip.org/mer/mer210/satellite-television-development-middle-east>.
WorldCat

Saleh, Ibrahim. "The Crossing Roads of Egypt: An Avenue of Participation Crucifies the Stagnation Development." *Global Media Journal* 2, no. 4 (2004). Last accessed on June 27, 2012 at <http://lass.calumet.purdue.edu/cca/gmj/OldSiteBackup/SubmittedDocuments/archivedpapers/fall2004/refereed/saleh.htm>.
WorldCat

Saleh, Nivien. *Third World Citizens and the Information Technology Revolution*. New York: Palgrave Macmillan, 2010.
Google Scholar Google Preview WorldCat COPAC

p. 933 "Saudi Arabia: Media Market Description" in *Worlds Association of Newspapers: World Press Trends 2008*. 2008. Last accessed on Jan. 17, 2012 at <http://www.ihudaif.com/wp-content/uploads/2010/01/WORLD-ASSOCIATION-OF-NEWSPAPERS---WORLD-PRESS-TRENDS-2008.pdf>.
WorldCat

"Saudi Arabia Moves Its Satellite Channel to Arabsat." *Al Masry Al Youm*. Sept. 8, 2011. Last accessed on Mar. 12, 2012 at <http://www.almasryalyoum.com/en/node/493638>.
WorldCat

Sennitt, Andy. "Al Jazeera Kicked out of Egypt, Nilesat Signal Cut." *Media Network*. Jan. 30, 2011. Last accessed on June 27, 2012 at <http://blogs.rnw.nl/medianetwork/al-jazeera-kicked-out-of-egypt-nilesat-signal-cut>.
WorldCat

Shahine, Alaa. "New Media Flourish in Egypt." *UCLA Center for Communications and Community*. Apr. 27, 2004. Last accessed on Jan. 17, 2012 at <http://www.c3.ucla.edu/newsstand/global/new-media-flourish-in-egypt/>.
WorldCat

Sharp, Jeremy M. "Egypt, Congress and U.S. Relations." *Congressional Research Service*. Order Code RL33003. Aug. 12, 2008. Last accessed on June 27, 2012 at <http://fpc.state.gov/documents/organization/109518.pdf>.
WorldCat

"Showtime Arabia and Orbit Group Merge Pay TV Operations." AMEinfo.com. July 12, 2009. Last accessed on Jan. 17, 2012 at <http://www.ameinfo.com/203504.html>.
WorldCat

"Shut Down Gadaffi State TV." *Change.org*. July 13, 2011. Last accessed on Mar. 12, 2012 at <http://www.change.org/petitions/shut-down-gaddafi-state-tv>.
WorldCat

Solayman, Hanan. "New TV Channels Hit Egypt's Airwaves." *Daily News Egypt*. July 17, 2011. Last accessed on June 27, 2012 at <http://www.thedailynewsegypt.com/new-tv-channels-hit-egypts-airwaves.html>.
WorldCat

Sout Al Qahira. "About Sout Al Qahira." *Sout Al Qahira*. Last accessed on Jan. 17, 2012 at <http://www.soutalqahira-eg.com/about-ern.aspx>.
WorldCat

"Spotlight." *Melody Holding*. Last accessed on June 27, 2012 at <http://www.melodyholding.com/>
WorldCat

State Information Service (SIS). *Egypt Yearbook 2007*. 2007. Last accessed on July 3, 2012 at <http://www.sis.gov.eg/En/ListTemplate.aspx?Category_ID=870>.
WorldCat

"Subsidiaries and Investments." Telecom Egypt. Last accessed on June 27, 2012 at <http://ir.telecomegypt.com.eg/Subsidiaries.asp>.
WorldCat

"Target 8." *International Telecommunications Union*. 2010. Last accessed on July 8, 2012 at <http://www.itu.int/ITU-

D/ict/publications/wtdr_10/material/WTDR2010_Target8_e.pdf>.
WorldCat

“TBS Feature Interview: Sheikh Saleh Kamel.” *Transnational Broadcasting Studies (TBS) Archives*. May 1, 1998 (Fall 1998). Last accessed on Jan. 17, 2012 at <http://www.tbsjournal.com/Archives/Fall98/Interviews1/Sheikh_Saleh/sheikh_saleh.html>.
WorldCat

TE Data. “Home ADSL Price List.” *TE DATA 2012*. Last accessed Jan. 5, 2012 at <http://www.tedata.net/eg/en/Home-ADSL/Home-ADSL-Prices-List>.
WorldCat

“Telecom Egypt Announces the Acquisition of Remaining TE Data Stake.” *Telecom Egypt*. Jan. 5, 2010. Last accessed on Mar. 12, 2012 at <http://ir.telecomegypt.com.eg/press%20releases/press%20releases/TE%20Data%20PR%20-%20Final.pdf>.
WorldCat

Telecom Egypt, “Annual Report 2009: Equipped For A New Era,” Giza, 2009, 24. Last accessed on Nov. 27, 2011 at <http://ir.telecomegypt.com.eg/admin/uploads/annual-report-2009/FINAL%20ANNUAL%20web.pdf>.
WorldCat

Telecom Egypt. “Annual Reports 2006–2009.” *Telecom Egypt*. Last accessed on May 14, 2012 at <http://ir.telecomegypt.com.eg/Annual%20Reports.asp>.
WorldCat

Telecom Egypt. “Basic Information.” *Telecom Egypt*. Last accessed Nov. 27, 2011 at <http://ir.telecomegypt.com.eg/Basic%20Information.asp#>.
WorldCat

Telecom Egypt. “Company Fact Sheet.” *Telecom Egypt*. Last accessed on June 27, 2012 at <http://ir.telecomegypt.com.eg/Company%20Fact%20Sheets.asp>.
WorldCat

Telecom Egypt. “Company Milestones.” *Telecom Egypt*. Last accessed on June 27, 2012 at <http://ir.telecomegypt.com.eg/Company%20Milestones.asp>.
WorldCat

Telecom Egypt. “Company Profile.” *Telecom Egypt*. Last accessed on Nov. 27, 2011 at <http://ir.telecomegypt.com.eg/Basic%20Information.asp#>.
WorldCat

Telecom Egypt. “Ownership Structure.” *Telecom Egypt*. Last accessed on June 27, 2012 at <http://telecom.tedata.net/uipages/Ownership_Structure.aspx>.
WorldCat

Telecom Egypt. “Wholesale.” *Telecom Egypt*. 2008. Last accessed on Jan. 3, 2012 at <http://www.telecomegypt.com.eg/English/wholesale_MPLS_IP-VPN.asp#>.
WorldCat

“Telecom Watchdog Decision Clears Way for 4th Egyptian Mobile Operator.” *Ahram Online*. May 7, 2012. Last accessed on June 4, 2012 at <http://english.ahram.org.eg/NewsContent/3/12/40995/Business/Economy/Telecom-watchdog-decision-clears-way-for-
p. 934 th-Egypti.aspx ↳ >.
WorldCat

“The Arab World’s Major Pay TV Operators Provide A Choice of 140 Pay TV Channels.” *Arab Advisors Group*. Jan. 14, 2008. Last accessed on July 26, 2014 at <http://www.arabadvisors.com/Pressers/presser-140108.htm-0>.
WorldCat

The Cairo Institute for Human Rights Studies. *Media in North Africa: Obstacles and Challenges*. United Nations Economic Commission for Africa, 2007, 4. Last accessed on Jan. 16, 2012 at <http://www.uneca.org/africanmedia/documents/NorthAfrica-eng-report.pdf>.
WorldCat

“The Dispute over the Ownership of Egypt’s Mobinil.” *International Telecommunications Union Regulation Toolkit*. Dec. 22, 2011. International Telecommunications Union. Last accessed on July 27, 2011 at <http://www.ictregulationtoolkit.org/en/PracticeNote.3264.html>.

WorldCat

“The Emergency Law in Egypt.” *Fidh: Worldwide Human Rights Movement*. Nov. 17, 2001. Last accessed on Jan. 16, 2012 at <http://www.fidh.org/THE-EMERGENCY-LAW-IN-EGYPT>.
WorldCat

“The Media Free Zone.” *Egyptian Media Production City (EMPC)*. Last accessed on Dec. 29, 2011 at <http://www.empc.com.eg/English/MediaFreeZone.html>.
WorldCat

UNICJ. *ICJ Submission to the Universal Periodic Review of Egypt*. International Commission of Jurists, 2009. Last accessed on Jan. 16, 2012 at <http://www.icj.org/IMG/UPRSubmission-Egypt.pdf>.
WorldCat

United Nations. “Article 19.” *The United Nations Declaration of Human Rights*. Last accessed on June 27, 2012 at <http://www.un.org/en/documents/udhr/index.shtml#a19>.
WorldCat

“Urgent Communication to the Egyptian Public Prosecutor a Call for Arresting the Egyptian Minister of Mass Media and Information & Prosecuting Him for Stimulating Hatred and Murder.” *The Arab Center for the Independence of the Judiciary and the Legal Profession (ACIJLP)*. Feb. 25, 2011. Last accessed on Jan. 16, 2012 at <http://www.acijlp.org/?browser=view&ID=24’>.
WorldCat

Williams, Sean. “Walking the Plank.” *Arabian Business*. Dec. 15, 2010. Last accessed on Jan. 17, 2012 at <http://www.arabianbusiness.com/walking-plank-366838.html>.
WorldCat

World Bank. “Egypt, Arab Rep.” *World Bank Development Indicators*. Last accessed on Dec. 28, 2011 at <http://data.worldbank.org/country/egypt-arab-republic>.
WorldCat

YallaMisr. “About Us.” *YallaMisr*. Last accessed on June 27, 2012 at <http://www.yallamisr.com/about.htm>.
WorldCat

Works Cited

Abdel Fattah, Amira. *Press Freedom in Egypt*. MA dissertation, The American University in Cairo, 2008.

Abdel Hafez, Fatma H.M., and Wahba, Khaled (2004). "Assessment of the 'Free Internet Access' Project on the Internet Market in Egypt: System Dynamics View." Presented at *Systems Dynamics Society Conference*. Oxford, England, July 25–29, 2004. Last accessed Jan. 5, 2011 at <http://www.systemdynamics.org/conferences/2004/SDS_2004/PAPERS/276WAHBA.pdf>.
WorldCat

Abou Hatab, Fathy. *Personal interview.* May 16, 2012.
Google Scholar Google Preview WorldCat COPAC

Africa Telecom. *Information Gatekeepers Inc*., 2:3, March 2001.
Google Scholar Google Preview WorldCat COPAC

Al Ahram. "About Us." *Al Ahram*. Last accessed on May 29, 2012 at <http://english.ahram.org.eg/UI/Front/Aboutus.aspx>.
WorldCat

"Al Ahram Establishment Websites." *Al Ahram International North America Inc*. *Limited*. Last accessed on Jan. 16, 2012 at <http://aina.ahram.org.eg/Ahram %20USA%5COnline%20 Ads%5CAl-Ahram%20 Websites.pdf>.
WorldCat

Al Bawaba. "Click to Become IPO in Egypt." *Al Bawaba News*. May 2, 2001. Last accessed on Dec. 18, 2011 at <http://www.albawaba.com/news/click-gsm-become-ipo-egypt>.
WorldCat

"Al Dustour." *The Media Briefing*. Last accessed on Jan. 16, 2012 at <http://www.themediabriefing.com/products/Al dustour/>.
WorldCat

Al Gomhouriyya Newspaper, Last accessed on July 5, 2012 at <http://www.algomhuria.net.eg/algomhuria/today/pdf/>.
WorldCat

"Al Jazeera Closed for Operating Unlicensed, Sawiris Considers Qatar-based Channel." *Egypt Independent*. July 5, 2012. Al Mary Al Youm. Last accessed on Jan. 17, 2012 at <http://www.almasryalyoum.com/en/node/496619>.
WorldCat

Al Jazeera. "Corporate Profile." *Al Jazeera*. Last accessed Dec. 29, 2011 at <http://www.aljazeera.com/aboutus/2006/11/2008525185555444449.html>.
WorldCat

Allam, Rasha. "Media Landscape: Egypt." *European Journalism Centre*. Nov. 8, 2010. Last accessed on Dec. 29, 2011 at <http://www.ejc.net/media_landscape/article/egypt/>.
WorldCat

Al Masry Al Youm. "About Al Masry Al Youm." *Al Masry Al Youm*. Last accessed on Jan. 16, 2012 at <http://www.almasryalyoum.com/en/node/54>.
WorldCat

p. 928 "Al Masry Al Youm: Transforming the Egyptian Press." *Tavaana*. Media Monitor. 28 Jan. 2011. Last accessed on Jan. 16, 2012 at <http://www.tavaana.org/archive.jsp?restrictids=nu_repeatitemid&restrictvalues=207150200034129555277391O&lang=en>.
WorldCat

Al Rai Media Group. "Al Rai Media Group." *Al Rai Media Group*. Last accessed on June 27, 2012 at <http://www.alraimedia.com/Alrai/MediaGroup.aspx>.
WorldCat

"Al Sayed Al Badawy." *Ahram Online*. 19 Nov. 2011. Last accessed on Jan. 16, 2012 at <http://english.ahram.org.eg/NewsContent/33/102/26705/Elections-/Whos-who/AlSayed-AlBadawi.aspx>.
WorldCat

Al Wafd. *Official Website*. Last accessed on June 27, 2012 at <http://www.alwafd.org/digital/>.
WorldCat

Amin, Hussein. *Strengthening the Rule of Law and Integrity in the Arab World: Report on the State of the Media in Egypt*. The Arab Center for the Development of the Rule of Law and Integrity, 2009, 6. Last accessed on June 10, 2012 at <http://www.arabruleoflaw.org/Files/PDF/Media/English/P2/Egypt_MediaReportP2_En.pdf>.
WorldCat

"An Overly French Mobinil." *Egypt Independent*, no. 4, June 7, 2012, 11. Last accessed on 27 June 2012 at <http://www.scribd.com/doc/96300554/Egypt-Independent-Jun-07>.
WorldCat

"Arab Radio and Television Network." *Wikipedia*. Sept. 21, 2011. Last accessed on Dec. 19, 2012 at <http://en.wikipedia.org/wiki/Arab_Radio_and_Television_Network>.
WorldCat

Arab Satellite Communications Organization. "About Us. Corporate Governance." *Arab Satellite Communications Organization*. Last accessed on June 27, 2012 at <http://www.arabsat.com/pages/ArabLeague.aspx>.
WorldCat

Attalah, Lina and Rizk, Nagla. "Egypt's Evolving Media Landscape: Access, Public Interest and Control," in *A New Frontier*, *An Old Landscape*. Report for the Ford Foundation, November 2011, 118–136. Last accessed on January 16, 2012 at <http://participatorymedia.lab.asu.edu/files/NewFrontierOldLandscape.pdf>.
WorldCat

Attia, Tarek. "No More Free TV." *Al Ahram Weekly*, no. 526. Mar. 22–28, 2001. Last accessed on May 14, 2012 at <http://weekly.ahram.org.eg/2001/526/li3.htm>.
WorldCat

Black, Jeffrey. "Egypt Press: More Free, Still Fettered." *Arab Media and Society*. 2008. Last accessed on Jan. 16, 2012 at <http://www.arabmediasociety.com/?article=572>.
WorldCat

Bureau of Democracy, Human Rights and Labor. *2010 Human Rights Report: Egypt*. U.S. Department of State, 2011. Last accessed on June 27, 2012 at <http://www.state.gov/documents/organization/160456.pdf>.
WorldCat

"Civil Movements: The Impact of Facebook and Twitter," in *Arab Social Media Report* (Vol 1, No. 2). Dubai School of Government, 2011, 16. Last accessed on Mar. 5, 2012 at <http://www.dsg.ae/en/Publication/Pdf_En/DSG_Arab_Social_Media_Report_No_2.pdf>.
WorldCat

Cochrane, Paul. "Saudi Arabia's Media Influence." *Arab Media and Society*. 2007. Last accessed on Jan. 17, 2012 at <http://www.arabmediasociety.com/?article=421> and <http://www.insightsmena.com/en/#!place=category&cat=Media+Usage>.
WorldCat

"Constitutional Declaration." *Cabinet*. Last accessed on Mar. 7, 2012 at <http://www.cabinet.gov.eg/AboutEgypt/Egyptian_constitution.aspx>.
WorldCat

"Control" in Hawtin, Dixie and Puddephatt, Andrew, eds. *A New Frontier*, *an Old Landscape*. New York: Ford Foundation, 2011, 118–136. Last accessed on Jan. 16, 2012 at <http://participatorymedia.lab.asu.edu/files/NewFrontierOldLandscape.pdf>.
WorldCat

Dubai Media Incorporated. "About Dubai Media Incorporated." *Dubai Media Incorporated*. Last accessed on June 27 2012 at <http://dmi.gov.ae/about_En.asp>.
WorldCat

"Egypt: Article 19 and the Justice Initiative Submission to the UN Universal Periodic Review" in the *Seventh Session of the UPR Working Group*. 2010. Last accessed on Jan. 16, 2012 at <http://www.article19.org/data/files/pdfs/submissions/egypt-article-19-and-the-justice-initiative-submission-to-the-un-universAl p.pdf>.
WorldCat

"Egypt Authorities Freeze New Satellite TV Station Licenses." *X Index*. 9 Sept. 2011. Last accessed on Jan. 16, 2012 at <http://www.indexoncensorship.org/2011/09/egypt-authorities-freeze-new-satellite-tv-station-licenses/>.
WorldCat

"Egypt Facebook Statistics." *Social Bakers*. Last accessed on Mar. 5, 2012 at <http://www.socialbakers.com/facebook-statistics/egypt>.
WorldCat

"Egypt Major African Mobile Markets: Future Growth Prospects." *Africa and Middle East Telecom Week*. Last accessed Jan. 18, 2012 at <http://www.africantelecomsnews.com/resources/AfricaOpp_Egypt.shtml>.
WorldCat

"Egypt." *Press Freedom and Media Development*. Last accessed on Jan. 16, 2012 at <http://www.wan-press.org/pfreedom/articles.php?id=4404>.
WorldCat

Egypt: The National Report on Literacy and Adult Education. United Nations Educational, Scientific and Cultural Organization,
p. 929 2009. Last ↳ accessed on Dec. 19, 2011 at www.unesco.org/fileadmin/MULTIMEDIA/. . ./UIL/. . ./Egypt.pdf.
WorldCat

"Egypt." *The World Factbook*. Last accessed on Mar. 7, 2012 at <https://www.cia.gov/library/publications/the-world-factbook/geos/eg.html>.
WorldCat

Egyptian Television Network. "About Us." *Egyptian Television Network (ETN)*. Last accessed on Jan. 17, 2012 at <http://www.egytv.net/aboutus.aspx>.
WorldCat

El Azhary, Emad. *Personal interview.* Nov. 24, 2011.
Google Scholar Google Preview WorldCat COPAC

El Galad, Magdy. Interview. Al Nas TV. Last accessed on Jan. 16, 2012 at <http://www.youtube.com/watch?v=TSnLjXi2rdI>.
WorldCat

El Hefnawy, Magdi. *Personal interview.* June 30, 2011.
Google Scholar Google Preview WorldCat COPAC

ERTU. "Sectors." *ERTU*. Last accessed on Dec. 15, 2011 at <http://ertu.org/1/sectors.asp>.
WorldCat

Etisalat. "About Us." *Etisalat*. Last accessed on June 27, 2012 at <http://etisalat.com.eg/etisalat/Etisalat_Portal_En/about/corporate.htm?_pageid=42,1&_dad=portal&_schema=PORTAL&siteAlias=etisalat&sitePath=Etisalat_Portal_En&kpAlias=about&pageAlias=corporate>.
WorldCat

Etisalat. "Corporate Information." *Etisalat*. Last accessed June 27, 2012 at <http://etisalat.com.eg/etisalat/Etisalat_Portal_En/about/corporate.htm?_pageid=42,1&_dad=portal&_schema=PORTAL&siteAlias=etisalat&sitePath=Etisalat_Portal_En&kpAlias=about&pageAlias=corporate>.
WorldCat

"Etisalat Led Group Signs $2.88b Deal." *MENAFN*. 23 Aug. 2006. Last accessed on Jan. 4, 2011 at <https://www.menafn.com/qn_news_story_s.asp?StoryId=1093124586>.
WorldCat

"EtisalatMisr Acquires NOL and EgyNet." *Arab Finance*. Oct. 27, 2008. Last accessed 8 Jan. 2012 at <https://www.arabfinance.com/News/newsdetails.aspx?Id=122348>.
WorldCat

Etisalat. "Our History." *Etisalat*. Last accessed on June 27, 2012 at <http://etisalat.com/html/history.html>.
WorldCat

"Facebook Usage Factors and Analysis," in *Arab Social Media Report* 1, no. 1. Dubai School of Government, 2011, 6. Last accessed on Mar. 5, 2012 at <http://unpan1.un.org/intradoc/groups/public/documents/dsg/unpan044212.pdf>.
WorldCat

Fahim, Joseph. "OTV Hits the Airwaves." *Daily News Egypt*. Jan. 30, 2007. Last accessed on Dec. 26, 2011 at

<http://www.dailystaregypt.com/article.aspx?ArticleID=5308>.
WorldCat

Fakharany, Wael. *Email interview.* Sept. 14, 2011.
Google Scholar Google Preview WorldCat COPAC

Fakhredinne, Jihad. "Pan-Arab Satellite Television: Now the Survival Part." *Allied Media Corporation*. Last accessed on Jan. 17, 2012 at <http://www.allied-media.com/ARABTV/pan-arab-sat.htm>.
WorldCat

"False Freedom: Online Censorship in the Middle East and North Africa." *UNHCR: Human Rights Watch*. Nov. 15, 2005. Last accessed on Feb. 13, 2012 at <http://www.unhcr.org/refworld/docid/45cc445f2.html>.
WorldCat

Fandy, Mamoun. *(Un)Civil War of Words: Media and Politics in the Arab World*. Westport, CT: Praeger, 2007.
Google Scholar Google Preview WorldCat COPAC

Field, Nathan and Hamam, Ahmed. "Salafi Satellite TV in Egypt." *Arab Media and Society*. 2009. Last accessed on Jan. 18, 2012 at <http://www.arabmediasociety.com/?article=712>.
WorldCat

"Freedom of Expression Project: The Press in Egyptian Legislation" in *Middle East and Islamic Studies Collection*. Cornell University Library. Last accessed on Jan. 16, 2012 at <http://www.library.cornell.edu/colldev/mideast/egpress.htm>.
WorldCat

Full Text: Draft Egyptian Broadcast Law. Arab and Media Society, 2008, Article 1, Clause 4. Last accessed June 27, 2012 at <http://www.arabmediasociety.com/articles/downloads/20080729105525_AMS6_draft_media_law_english.pdf>.
WorldCat

"Gamal Marwan Buys 100 Per Cent of MenaNet Communications SAE (MenaNet) from The African Lakes Corporation plc (ALC)." *AME Info*. May 24, 2004. Last accessed on 12 Mar. 2012 at <http://www.ameinfo.com/40072.html>.
WorldCat

Good News Group. "Companies" *Good News Group*. Last accessed on Jan. 16, 2012 at <http://www.goodnewsgroup.com/>.
WorldCat

Good News Group. "Good News for Radio and TV." *Good News Group*. 2006. Last accessed on Jan. 16, 2012 at <http://www.goodnewsgroup.com/gng9.swf>.
WorldCat

GoodNews4Me. "Information." *GoodNews4Me*. Al Alam Al Youm. Last accessed on Jan. 16, 2012 at <http://www.gn4me.com/alalamalyoum/info.jsp?edition_id=3238>.
WorldCat

"Group Companies: Orbit Showtime Network." *KIPCO: Kuwait Projects Company (Holding)*. Last accessed on Jan. 17, 2012 at <http://www.kipco.com/GroupCompanies.asp?q_pageid=56>.
WorldCat

p. 930 Hagey, Keach. "News Corp Eyes Stake in Saudi Firm Rotana Media." *The National*. 2 Sept. 2009. Last accessed on Jan. 17, 2012 at ↳ <http://www.thenational.ae/business/media/news-corp-eyes-stake-in-saudi-firm-rotana-media>.
WorldCat

Hamdy, Naila. "A Dream TV Come True." *Transnational Broadcasting Studies (TBS)*, No. 8, (Spring 2002). Last accessed on Jan. 17, 2012 at <http://www.tbsjournal.com/Archives/Spring02/sirhan.html>.
WorldCat

Hamdy, Naila. "El Mehwar the Mercurial." *Transnational Broadcasting Studies (TBS)*. No. 9, (Fall/Winter 2002). Last accessed on Jan. 17, 2012 at <http://www.tbsjournal.com/Archives/Fall02/Mehwar.html>.
WorldCat

Hamdy, Naila. Personal interview. June 10, 2012.

Hamzawy, Amr and Dunne, Michele. "Media Freedom Restricted as Egyptian Parliamentary Elections Approach." *Carnegie Endowment for International Peace*. Last accessed on Jan. 17, 2012 at

<http://egyptelections.carnegieendowment.org/2010/10/25/media-freedom-restricted-as-egyptian-parliamentary-elections-approach>.
WorldCat

Hassanein, Leila. "Access to Infrastructure: Egypt." *GISWatch*. 2008. Last accessed Dec. 22, 2010 at <http://www.giswatch.org/sites/default/files/Egypt_0.pdf>.
WorldCat

Hot Telecom. *Country profile: Egypt 2008*. Apr. 30, 2008. Last accessed on Jan. 8, 2012 at <http://www.hottelecoms.com/Egypt.pdf>.
WorldCat

Howard, P.N. "Ownership Diversity in Muslim Media Systems." *World Information Access Project (WIA)*. Oct. 6, 2008. Last accessed on Jan. 16, 2012 at <http://www.wiaproject.org/index.php/68/ownership-diveristy-in-muslim-media-systems>.
WorldCat

"Human Resources Division." *Al Jazeera Network*. Last accessed on June 27, 2012 at <http://recruitment.aljazeera.net/english/>.
WorldCat

"Industrial Conglomerates: Mawarid Group Company LLC." *Bloomberg Businessweek*. Last accessed on Jan. 17, 2012 at <http://investing.businessweek.com/research/stocks/private/people.asp?privcapId=22595361>.
WorldCat

"Internet Filtering in Egypt." *OpenNet Initiative*. Aug. 6, 2009. Last accessed on Feb. 13, 2012 at <http://opennet.net/sites/opennet.net/files/ONI_Egypt_2009.pdf>.
WorldCat

IREX. "Media sustainability Index 2005: Middle East and North Africa." *IREX*. Last accessed on May 24, 2012 at <http://www.irex.org/system/files/MSI05_MENA_EG.pdf 26>.
WorldCat

Jaafar, A. "Mixed Results for LBC – Rotana: Arab Conglomerate Tries to Compete with MBC." *Variety*. Oct. 2, 2008. Last accessed on Jan. 17, 2012 at <http://www.variety.com/article/VR1117993363>.
WorldCat

Karlekar, Karen D. and Cook, Sarah G., ed. *Freedom of the Press 2008: A Global Survey of Media Independence*. New York: Rowman and Littlefield Publishers, Inc. 2008, 121.
Google Scholar Google Preview WorldCat COPAC

Kassem, Hisham. *Personal interview.* 21 Feb. 2012.
Google Scholar Google Preview WorldCat COPAC

Kawach, Nadim. "Saudi Cleric Slams MBC over TV Series." *Emirates 24/7*. Aug. 18, 2010. Last accessed on May 29, 2012 at <http://www.emirates247.com/entertainment/films-music/saudi-cleric-slams-mbc-over-tv-series-20102008-18-11.280816>.
WorldCat

Khalil, Joe. "News Television in the Arabian Gulf. . . Period of Transitions." *Global Media Journal* 5, no. 8 (2004).
Google Scholar WorldCat

K&M Engineering and Consulting Corporation. "ARENTO Cost of Service Study." *USAID*. National Telecommunications Organization & the U.S. Agency for International Development, 2011, 105. Last accessed on Dec. 19, 2011 at <http://pdf.usaid.gov/pdf_docs/PNABS218.pdf>.
WorldCat

Kotb, Ahmed. "Media Control." *Al Ahram Weekly Online*, 1056, July 14–20, 2011. Last accessed on Jan. 17, 2012 at <http://weekly.ahram.org.eg/2011/1056/eg692.htm>.
WorldCat

Kotler, P and Armstrong, Gray, eds. "Pricing: Understanding and Capturing Customer Value." In *Principles of Marketing*. New York: Pearson Prentice Hall, 2012. Last accessed on June 27, 2012 at <http://catalogue.pearsoned.co.uk/assets/hip/gb/hip_gb_pearsonhighered/samplechapter/0273752502.pdf>.
WorldCat

LinkdotNet. "News and Events." *LinkdotNet*. Last accessed on June 27, 2012 at

<http://www.link.net/English/Linkcorp/News+and+Events/OTH-Logo.htm>.
WorldCat

Madany, Sherine. “Egypt Postpones Second Fixed Line Auction for a Year.” *Daily News Egypt*. Sept. 8, 2008. Last accessed on Dec. 19, 2011 at <http://www.dailystaregypt.com/article.aspx?ArticleID=16317>.
WorldCat

Mattar, Eman. “El Hefaz and El Nas TV Channels Halted on TV and El Faraeen Warned.” *Business Investment Banking News*. Dec. 12, 2010. Last accessed on Jan. 18, 2012 at <http://www.bibnews.com/en/news_details.php?id=5012>.
WorldCat

“MBC, Largest Media Group in the Middle East Chooses Magnolia as Strategic Platform.” *Magnolia*. Mar. 9, 2011. Last accessed on May 29, 2012 at <http://www.magnolia-cms.com/our-company/news/press-releases/mbc-usa.html>.
WorldCat

MCIT. *Ministry of Communications and Information Technology eProtal*. Last accessed on Nov. 29, 2011 at <http://www.mcit.gov.eg/TeleCommunications/Historical_Prespective>.
WorldCat

p. 931 MCIT. “Telecom Reform Milestones.” *Ministry of Communication and Information Technology*. Last accessed on Nov. 29, 2011 at <http://www.mcit.gov.eg/TeleCommunications/Telecom_Reform_Milestones>.
WorldCat

“Media Usage.” *Insights MENA*. 2010. Last accessed on Jan. 16, 2012 at <http://www.insightsmena.com/en/#!place=category&cat=Media+Usage>.
WorldCat

Mekay, Emad. “TV Stations Multiply as Egyptian Censorship Falls.” *The New York Times*. July 13, 2011. Last accessed on Jan. 16, 2012 at <http://www.nytimes.com/2011/07/14/world/middleeast/14iht-M14B-EGYPT-MEDIA.html?_r=2&pagewanted=all>.
WorldCat

Middle East Rating and Investors Service. “Egyptian Company for Mobile Services S.A.E (Mobinil).” Merisratings.com. November 2009. Last accessed Jan. 10, 2011 at <http://www.mobinil.com/Investors/FinancialReports/doc/CreditRatingReportNov092ndIssue.pdf>.
WorldCat

“Minister: Al Jazeera Mubasher Misr Shut Down for Disregarding Law.” *Al Masry Al Youm*. Sept. 12, 2011. Last accessed on Jan. 17, 2012 at <http://www.almasryalyoum.com/en/node/494878>.
WorldCat

Ministry of Communications and Information Technologies (MCIT). *Dataset*. Last accessed on July 5, 2012 at <http://www.mcit.gov.eg/Indicators/Ind_Communications.aspx>.
WorldCat

Ministry of Communications and Information Technology (MCIT). “ICT Infrastructure and Access.” *Egypt ICT Indicators*. Last accessed on Jan. 5, 2012 at <http://www.new.egyptictindicators.gov.eg/en/Indicators/_layouts/KeyIndicatorsViewer.aspx>.
WorldCat

Ministry of Communications and Information Technology (MCIT). “Key Indicators.” *Egypt ICT Indicators*. May 2010. Last accessed on Dec. 15, 2011 at <http://www.new.egyptictindicators.gov.eg/en/Indicators/_layouts/KeyIndicatorsViewer.aspx>.
WorldCat

Mobinil. “Annual Report 2010: Egyptian Company for Mobile Services (ECMS).” *Mobinil*. Last accessed on June 27, 2012 at <http://www.vmobinil.com/investors/AnnualReport2010.aspx>.
WorldCat

Monsef, Olfat A. “Pioneering Liberalization & Regulation of Telecommunications in The Arab Region.” *International Telecommunications Union*. November 2003. Last accessed on Mar. 12, 2012 at www.ituarabic.org/PreviousEvents/2003/reg/Doc7.ppt.
WorldCat

“Murdoch Buys into Rotana.” *Arab News*. Feb. 23, 2010. Last accessed on Dec. 19, 2011 at <http://arabnews.com/saudiarabia/article21517.ece>.
WorldCat

“Muslim Brotherhood to Launch Satellite TV Channel in April.” *Al Masry Al Youm*. Mar. 12, 2011. <http://www.almasryalyoum.com/en/node/349787>.
WorldCat

Nasrawi, Saif. “Wafd Party President Buys Al Dustour Newspaper.” *Al Masry Al Youm*. Aug. 23, 2010. Last accessed on Jan. 16, 2012 at <http://www.almasryalyoum.com/en/node/70155>.
WorldCat

National Telecom Regulatory Authority (NTRA). “About Us.” *National Telecom Regulatory Authority*. Last accessed on Nov. 30, 2011 at <http://www.tra.gov.eg/english/DPages_DPagesDetails.asp?ID=180&Menu=5>.
WorldCat

National Telecom Regulatory Authority (NTRA). “About Us.” *National Telecom Regulatory Authority (NTRA)*. Last accessed on June 27, 2012 at <http://www.tra.gov.eg/english/DPages_DPagesDetails.asp?ID=180&Menu=5>.
WorldCat

National Telecom Regulatory Authority (NTRA). “Broadband: The Speedy Access.” *National Telecom Regulatory Authority*. Last accessed on Dec. 15, 2011 at <http://www.tra.gov.eg/presentations/broadband_En.pdf>.
WorldCat

National Telecom Regulatory Authority (NTRA). “Consumer Protection: ‘Know Your Rights’ Awareness Campaign.” *National Telecom Regulatory Authority*. Apr. 20, 2010. Last accessed on June 27, 2012 at <http://www.tra.gov.eg/english/dpages_dpagesdetails.asp?ID=469>.
WorldCat

National Telecom Regulatory Authority (NTRA). “Media Convergence Issues in Egypt and the Region and Prospects for the Future.” *Scribd*. 2009. Last accessed Nov. 27, 2011 at www.scribd.com/doc/38482708/Doc9-NTRA.
WorldCat

National Telecom Regulatory Authority (NTRA). “Mobile Number Portability Guidelines.” *National Telecom Regulatory Authority*. 2008. Last accessed on Dec. 15, 2011 at <http://www.tra.gov.eg/Presentations/NumberPotabilityConsumersGuide24032008_En.pdf>.
WorldCat

National Telecom Regulatory Authority (NTRA). “Telecom Law.” *National Telecom Regulatory Authority*. Last accessed on June 4, 2012 at <http://www.tra.gov.eg/uploads/law/law_en.pdf>.
WorldCat

National Telecom Regulatory Authority (NRTA). “The NTRA Offering the Second Fixed-Line License.” *National Telecommunications Regulatory Authority*. Last accessed on Dec. 19, 2011 at <http://www.tra.gov.eg/english/news_newsdetails.asp?PID=36&ID=129>.
WorldCat

“News Media in Egypt.” *Press Reference*. Last accessed on Jan. 8, 2012 at <http://www.pressreference.com/Co-Fa/Egypt.html>.
WorldCat

p. 932 *Newspaper readership study 2002–2010*. Pan Arab Research Center (PARC), 2011.
Google Scholar Google Preview WorldCat COPAC

Nile Engineering Group. Last accessed on June 10, 2012 at <http://www.nileengineering.com/English/Products--and--Services/NileTel-Stores>.
WorldCat

NileSat. “Nilesat Company Profile.” *NileSat*. Last accessed on June 27, 2012 at <http://nilesat.com.eg/banners/AboutUs/CompanyProfile.aspx>.
WorldCat

Nile Television Network (NTN). Last accessed on June 27, 2012 at <http://www.ntntv.net/>.
WorldCat

“NTRA Says Finding Local Partner in Mobinil Mandatory.” *Arab Finance Brokerage Company*. Dec. 16, 2009. Last accessed Jan. 10, 2012 at <http://www.arabfinance.com/news/newsdetails.aspx?id=157214>.
WorldCat

Office of the United Nations High Commissioner for Human Rights. "International Covenant on Civil and Political Rights." *United Nations Human Rights*. Last accessed on Jan. 17, 2012 at <http://www.ohchr.org/EN/Pages/WelcomePage.aspx>.
WorldCat

Orascom Telecom. "Our History." *Orascom Telecom*. Last accessed on June 27, 2012 at <http://www.orascomtelecom.com/about/Contents/default.aspx?ID=395>.
WorldCat

Penal Code No. 58 of 1937 [Egypt]. August 1937. Last accessed on Mar. 7, 2012 at <http://www.unhcr.org/refworld/docid/3f827fc44.html>.
WorldCat

"Presidential Decree No. 313/1956, Amended by Law 14/1967." *United Group: Attorneys at Law*, *Legal Researcher and Human Rights Advocates*. Last accessed on Jan. 16, 2012 at <http://ug-law.com/index.php?option=com_content&view=article&id=424%3ApresidentiAl decree-no-3131956-amended-by-law-no-141967-&catid = 64%3Amedia-laws&Itemid = 89&lang = en>.
WorldCat

"Press Freedom Index 2011–2012." *Reporters Without Borders*. Last accessed on June 4, 2012 at <http://en.rsf.org/spip.php?page=classement&id_rubrique=1043>.
WorldCat

"Press Freedom Index Images of Press Freedom Index 2007–2012." *Explow News*. Last accessed on June 4, 2012 at <http://explow.com/Press_Freedom_Index%20images%20of%20press%20freedom%20index%202007-202012>.
WorldCat

"Press Releases." *Pehla: Premium Asian Entertainment*. Last accessed on Jan. 17, 2012 at <http://www.pehlatv.net/pehla/PressReleases/54/ADD-launches-Hallmark-channel-on-its-platform>.
WorldCat

"Radio Masr." *Facebook Page*. Last accessed on Jan. 17, 2012 at <http://www.facebook.com/RadioMasr?sk=info>.
WorldCat

Ramadan, Amr. "Egypt to Sign Triple-play Licenses, Says Kamel at Euromoney." *Daily News Egypt*. Sept. 30, 2010. Last accessed on July 5, 2012 at <http://www.thefreelibrary.com/Egypt+to+sign+triple-play+licenses,+says+Kamel+at+Euromoney.-a0238670369>.
WorldCat

Rao, Madanmohan. *Mobile Africa Report 2011: Regional Hubs of Excellence and Innovation*. MobileMonday, 2011. Last accessed on Jan. 18, 2012 at <http://www.mobilemonday.net/reports/MobileAfrica_2011.pdf>.
WorldCat

Reuters. "Egypt to Auction 2nd Fixed-line License on June 19." *Balancing Act Africa*, no. 394. Last accessed on Jan. 4, 2012 at <http://www.balancingact-africa.com/news/en/issue-no-394/telecoms/egypt-to-auction-2nd/en>.
WorldCat

Rizk, Nagla. "Stories from Egypt's Music Industry: De Facto Commons as Alternative to Copyright" in Rizk, Nagla and Shaver, Lea, eds. *Access to Knowledge: New Research on Intellectual Property and Development*. Bloomsbury Academic, 2010, 103. Last accessed on May 29, 2012 at <http://www.aucegypt.edu/Business/A2K4D/Documents/A2KEgypt.pdf>.
WorldCat

"Rotana Launches Egyptian General Entertainment Channel." June 1, 2011. *Arab News*. Last accessed on July 5, 2012 at <http://mediame.com/news/broadcasting_news/rotana_launches_egyptian_general_entertainment_channel>.
WorldCat

Rugh, William. A. *Arab Mass Media: Newspapers, Radio & Television in Arab Politics*. Westport, CT: Praeger, 2004.
Google Scholar Google Preview WorldCat COPAC

Sahota, Dawinderpal. "France Telecom Increases Stake in Egypt's Mobinil." Telecoms.com, Feb. 13, 2012. Last accessed on July 27, 2012 at <http://www.telecoms.com/tag/mobinil/>.
WorldCat

Sakr, Naomi. *Arab Television Today*. New York: I. B. Tauris, 2007.
Google Scholar Google Preview WorldCat COPAC

Sakr, Naomi. *Satellite Realms: Transnational Television, Globalization and The Middle East*. New York: I.B. Tauris, 2001.
Google Scholar Google Preview WorldCat COPAC

Sakr, Naomi. “Satellite Television and Development in the Middle East.” *Middle East Research and Information Project 2010*. Last accessed on May 29, 2012 at <http://www.merip.org/mer/mer210/satellite-television-development-middle-east>.
WorldCat

Saleh, Ibrahim. “The Crossing Roads of Egypt: An Avenue of Participation Crucifies the Stagnation Development.” *Global Media Journal* 2, no. 4 (2004). Last accessed on June 27, 2012 at <http://lass.calumet.purdue.edu/cca/gmj/OldSiteBackup/SubmittedDocuments/archivedpapers/fall2004/refereed/saleh.htm>.
WorldCat

Saleh, Nivien. *Third World Citizens and the Information Technology Revolution*. New York: Palgrave Macmillan, 2010.
Google Scholar Google Preview WorldCat COPAC

p. 933 “Saudi Arabia: Media Market Description” in *Worlds Association of Newspapers: World Press Trends 2008*. 2008. Last accessed on Jan. 17, 2012 at <http://www.ihudaif.com/wp-content/uploads/2010/01/WORLD-ASSOCIATION-OF-NEWSPAPERS---WORLD-PRESS-TRENDS-2008.pdf>.
WorldCat

“Saudi Arabia Moves Its Satellite Channel to Arabsat.” *Al Masry Al Youm*. Sept. 8, 2011. Last accessed on Mar. 12, 2012 at <http://www.almasryalyoum.com/en/node/493638>.
WorldCat

Sennitt, Andy. “Al Jazeera Kicked out of Egypt, Nilesat Signal Cut.” *Media Network*. Jan. 30, 2011. Last accessed on June 27, 2012 at <http://blogs.rnw.nl/medianetwork/al-jazeera-kicked-out-of-egypt-nilesat-signal-cut>.
WorldCat

Shahine, Alaa. “New Media Flourish in Egypt.” *UCLA Center for Communications and Community*. Apr. 27, 2004. Last accessed on Jan. 17, 2012 at <http://www.c3.ucla.edu/newsstand/global/new-media-flourish-in-egypt/>.
WorldCat

Sharp, Jeremy M. “Egypt, Congress and U.S. Relations.” *Congressional Research Service*. Order Code RL33003. Aug. 12, 2008. Last accessed on June 27, 2012 at <http://fpc.state.gov/documents/organization/109518.pdf>.
WorldCat

“Showtime Arabia and Orbit Group Merge Pay TV Operations.” AMEinfo.com. July 12, 2009. Last accessed on Jan. 17, 2012 at <http://www.ameinfo.com/203504.html>.
WorldCat

“Shut Down Gadaffi State TV.” *Change.org*. July 13, 2011. Last accessed on Mar. 12, 2012 at <http://www.change.org/petitions/shut-down-gaddafi-state-tv>.
WorldCat

Solayman, Hanan. “New TV Channels Hit Egypt’s Airwaves.” *Daily News Egypt*. July 17, 2011. Last accessed on June 27, 2012 at <http://www.thedailynewsegypt.com/new-tv-channels-hit-egypts-airwaves.html>.
WorldCat

Sout Al Qahira. “About Sout Al Qahira.” *Sout Al Qahira*. Last accessed on Jan. 17, 2012 at <http://www.soutalqahira-eg.com/about-ern.aspx>.
WorldCat

“Spotlight.” *Melody Holding*. Last accessed on June 27, 2012 at <http://www.melodyholding.com/>
WorldCat

State Information Service (SIS). *Egypt Yearbook 2007*. 2007. Last accessed on July 3, 2012 at <http://www.sis.gov.eg/En/ListTemplate.aspx?Category_ID=870>.
WorldCat

“Subsidiaries and Investments.” Telecom Egypt. Last accessed on June 27, 2012 at <http://ir.telecomegypt.com.eg/Subsidiaries.asp>.
WorldCat

“Target 8.” *International Telecommunications Union*. 2010. Last accessed on July 8, 2012 at <http://www.itu.int/ITU-

D/ict/publications/wtdr_10/material/WTDR2010_Target8_e.pdf>.
WorldCat

"TBS Feature Interview: Sheikh Saleh Kamel." *Transnational Broadcasting Studies (TBS) Archives*. May 1, 1998 (Fall 1998). Last accessed on Jan. 17, 2012 at <http://www.tbsjournal.com/Archives/Fall98/Interviews1/Sheikh_Saleh/sheikh_saleh.html>.
WorldCat

TE Data. "Home ADSL Price List." *TE DATA 2012*. Last accessed Jan. 5, 2012 at <http://www.tedata.net/eg/en/Home-ADSL/Home-ADSL-Prices-List>.
WorldCat

"Telecom Egypt Announces the Acquisition of Remaining TE Data Stake." *Telecom Egypt*. Jan. 5, 2010. Last accessed on Mar. 12, 2012 at <http://ir.telecomegypt.com.eg/press%20releases/press%20releases/TE%20Data%20PR%20-%20Final.pdf>.
WorldCat

Telecom Egypt, "Annual Report 2009: Equipped For A New Era," Giza, 2009, 24. Last accessed on Nov. 27, 2011 at <http://ir.telecomegypt.com.eg/admin/uploads/annual-report-2009/FINAL%20ANNUAL%20web.pdf>.
WorldCat

Telecom Egypt. "Annual Reports 2006–2009." *Telecom Egypt*. Last accessed on May 14, 2012 at <http://ir.telecomegypt.com.eg/Annual%20Reports.asp>.
WorldCat

Telecom Egypt. "Basic Information." *Telecom Egypt*. Last accessed Nov. 27, 2011 at <http://ir.telecomegypt.com.eg/Basic%20Information.asp#>.
WorldCat

Telecom Egypt. "Company Fact Sheet." *Telecom Egypt*. Last accessed on June 27, 2012 at <http://ir.telecomegypt.com.eg/Company%20Fact%20Sheets.asp>.
WorldCat

Telecom Egypt. "Company Milestones." *Telecom Egypt*. Last accessed on June 27, 2012 at <http://ir.telecomegypt.com.eg/Company%20Milestones.asp>.
WorldCat

Telecom Egypt. "Company Profile." *Telecom Egypt*. Last accessed on Nov. 27, 2011 at <http://ir.telecomegypt.com.eg/Basic%20Information.asp#>.
WorldCat

Telecom Egypt. "Ownership Structure." *Telecom Egypt*. Last accessed on June 27, 2012 at <http://telecom.tedata.net/uipages/Ownership_Structure.aspx>.
WorldCat

Telecom Egypt. "Wholesale." *Telecom Egypt*. 2008. Last accessed on Jan. 3, 2012 at <http://www.telecomegypt.com.eg/English/wholesale_MPLS_IP-VPN.asp#>.
WorldCat

"Telecom Watchdog Decision Clears Way for 4th Egyptian Mobile Operator." *Ahram Online*. May 7, 2012. Last accessed on June 4, 2012 at <http://english.ahram.org.eg/NewsContent/3/12/40995/Business/Economy/Telecom-watchdog-decision-clears-way-for-
p. 934
th-Egypti.aspx ↳ >.
WorldCat

"The Arab World's Major Pay TV Operators Provide A Choice of 140 Pay TV Channels." *Arab Advisors Group*. Jan. 14, 2008. Last accessed on July 26, 2014 at <http://www.arabadvisors.com/Pressers/presser-140108.htm-0>.
WorldCat

The Cairo Institute for Human Rights Studies. *Media in North Africa: Obstacles and Challenges*. United Nations Economic Commission for Africa, 2007, 4. Last accessed on Jan. 16, 2012 at <http://www.uneca.org/africanmedia/documents/NorthAfrica-eng-report.pdf>.
WorldCat

"The Dispute over the Ownership of Egypt's Mobinil." *International Telecommunications Union Regulation Toolkit*. Dec. 22, 2011. International Telecommunications Union. Last accessed on July 27, 2011 at <http://www.ictregulationtoolkit.org/en/PracticeNote.3264.html>.

WorldCat

“The Emergency Law in Egypt.” *Fidh: Worldwide Human Rights Movement*. Nov. 17, 2001. Last accessed on Jan. 16, 2012 at <http://www.fidh.org/THE-EMERGENCY-LAW-IN-EGYPT>.
WorldCat

“The Media Free Zone.” *Egyptian Media Production City (EMPC)*. Last accessed on Dec. 29, 2011 at <http://www.empc.com.eg/English/MediaFreeZone.html>.
WorldCat

UNICJ. *ICJ Submission to the Universal Periodic Review of Egypt*. International Commission of Jurists, 2009. Last accessed on Jan. 16, 2012 at <http://www.icj.org/IMG/UPRSubmission-Egypt.pdf>.
WorldCat

United Nations. “Article 19.” *The United Nations Declaration of Human Rights*. Last accessed on June 27, 2012 at <http://www.un.org/en/documents/udhr/index.shtml#a19>.
WorldCat

“Urgent Communication to the Egyptian Public Prosecutor a Call for Arresting the Egyptian Minister of Mass Media and Information & Prosecuting Him for Stimulating Hatred and Murder.” *The Arab Center for the Independence of the Judiciary and the Legal Profession (ACIJLP)*. Feb. 25, 2011. Last accessed on Jan. 16, 2012 at <http://www.acijlp.org/?browser=view&ID=24’>.
WorldCat

Williams, Sean. “Walking the Plank.” *Arabian Business*. Dec. 15, 2010. Last accessed on Jan. 17, 2012 at <http://www.arabianbusiness.com/walking-plank-366838.html>.
WorldCat

World Bank. “Egypt, Arab Rep.” *World Bank Development Indicators*. Last accessed on Dec. 28, 2011 at <http://data.worldbank.org/country/egypt-arab-republic>.
WorldCat

YallaMisr. “About Us.” *YallaMisr*. Last accessed on June 27, 2012 at <http://www.yallamisr.com/about.htm>.
WorldCat

Egypt—Data Summaries

Egypt’s media industries are in transition following the several changes in government since 2011. Due to the limited liberalization of the national media industries prior to 2011, Egypt has the fourth highest weighted average HHI of all the countries surveyed at 5,041 (PI is ranked #5, at 5,071) (Table 29.13). Egypt’s newspapers and video channels markets exhibit one of the highest concentrations of state ownership outside of China, a situation that the several regime changes have not altered (Table 29.14). Despite commercialization in the 1990s and 2000s, state regulators and censors wield significant influence over all broadcast and print content.

Table 29-13. National Media Industries Concentration in Egypt (Subsidiary organizations denoted by italics)

	2004/5		2011 or Most Recent		% Change Annual Average	
	Company Power Index in Country	Company Share of the Overall National Media Market (%)	Company Power Index in Country	Company Share of the Overall National Media Market (%)	Company Power Index in Country	Company Share of the Overall National Media Market (%)
Government of Egypt	4,111	51.2	3,311	45.5	–2.8	–0.81
Telecom Egypt (public)	*3,329*	*41.4*	*2,746*	*37.3*	*–2.5*	*–0.58*
Egyptian Radio and Television Union (public)	*428*	*5.1*	*340*	*3.6*	*–2.9*	*–0.22*
Al Ahram (public)	*44*	*1.2*	*10*	*0.44*	*–11.0*	*–0.1*
Al Akhbar (public)	*39*	*1.1*	*15*	*0.5*	*–8.7*	*–0.08*
Nile Television Network (public)	*44*	*1.9*	*7*	*0.7*	*–12.0*	*–0.18*
Al Gomhouria (public)	*12*	*0.61*	*7*	*0.4*	*–5.6*	*–0.03*
Mobinil (Orange, France)	1,132	21.2	704	20.7	–5.4	–0.08
Vodafone (UK)	263	10.2	275	12.7	0.6	0.35
Etisalat (UAE)	0	0.0	322	13.6	N/A	1.9
LinkDotNet	63	2.1	58	2.1	–1.0	0.0
Hayat	0	0.0	11	0.85	N/A	0.1
Google (US)	19	0.2	53	0.6	25.4	0.05
Panorama Action TV	0	0.0	10	0.8	N/A	0.11
ART (Saudi Arabia)	4	0.6	0.2	0.09	–13.4	–0.07
Rotana (Saudi Arabia)	1	0.3	6	0.6	48.3	0.04
MBC (Saudi Arabia)	9	0.8	5	0.6	–5.4	–0.04
Melody Entertainment	0.6	0.2	2	0.4	35.6	0.02
Dream TV	20	1.3	3	0.4	–12.4	–0.1
Al Baraheen (Saudi Arabia)	0	0.0	2	0.4	N/A	0.06
Al Masry Al Youm	0.0	0.02	4	0.3	8,321.9	0.04

Al Mehwar	1.2	0.3	0.8	0.2	–5.4	–0.01
Al Jazeera (Qatar)	3	0.5	0.3	0.1	–13.0	–0.05

Media Concentration Index	**2004/5**	**2011 or Most Recent**	**% Change Annual Average**
Total Revenue: Nat’l Media Industry (mil US$)	4,079	7,979	13.7
Total Voices (*n*)	29	35	3.0
Net Voices (*n*)	26	32	3.3
Public Ownership (%)	51.3	48.3	–0.42
Foreign Ownership (%)	37.1	50.3	1.9
C4 Average—Weighted	92.2	93.6	0.2
HHI Average—Weighted	6,269	5,041	–2.8
C1 Average—Weighted	65	53	–2
Noam Index Average—Weighted	2,729	2,741	0.06
Pooled Overall Sector C4	84.7	92.5	1.1
Pooled Overall Sector HHI	3,186	2,853	–1.5
Pooled Overall Sector Noam Index	385	227	–5.8
Market Share of Top 10 Companies: Nat’l Media Industry (%) (Pooled C10)	89.3	97.9	1.2
National Power Index	5,653	4,774	–2.2

Table 29–14. Top Content Media Companies in Egypt

	2004/5		2011 or Most Recent		% Change Annual Average	
	Company Power Index in Country	**Company Share of the National Content Media Market (%)**	**Company Power Index in Country**	**Company Share of the National Content Media Market (%)**	**Company Power Index in Country**	**Company Share of the National Content Media Market (%)**
Government of Egypt	3,493	44.0	2,828	35.2	–2.7	–1.3
Egyptian Radio and Television Union (Public)	*1,914*	*22.9*	*2,159*	*22.7*	*1.8*	*–0.03*
Al Ahram (public)	*198*	*5.2*	*65*	*2.8*	*–9.6*	*–9.6*
Al Akhbar (Public)	*176*	*4.9*	*97*	*3.4*	*–6.4*	*–0.2*
Nile Television Network (NTN) (Public)	*195*	*8.6*	*44*	*4.4*	*–11.1*	*–0.6*
Al Gomhouria (Public)	*54*	*2.7*	*47*	*2.4*	*–1.9*	*–0.05*
Google (US)	85	0.9	337	3.5	42.1	0.4
Hayat	0.0	0.0	72	5.4	N/A	0.8
Al Baraheen (Saudi Arabia)	0.0	0.0	15	2.5	N/A	0.4
Rotana (Saudi Arabia)	6	13.7	38	49.5	0.7	0.4
MBC (Saudi Arabia)	39	3.8	34	3.7	–0.02	0.0
Al Masry Al Youm	0.03	0.07	28	22.8	118.2	0.3
Dream TV	90	5.7	17	2.6	–0.1	–0.5
Panorama Entertainment TV	0	0.0	60	5.0	N/A	0.7
Melody Entertainment	3	1.0	13	2.3	0.6	0.2
Al Mehwar (public)	6	1.4	5	1.4	–0.02	0.0
Nile Radio Productions	2	0.2	3	0.3	0.07	0.02
ART (Saudi Arabia)	18	2.6	1	0.6	–13.4	–0.3
Al Jazeera (Qatar)	14	2.3	2	0.9	–0.1	–0.2

Media Concentration Index	**2004/5**	**2011 or Most Recent**	**% Change Annual Average**
Public Ownership (%)	44.3	35.5	–1.3%

Foreign Ownership (%)	25.2	21.7	–0.5%
C4 Average—Weighted	65.6	59.6	–0.9%
HHI Average—Weighted	3,893	3,510	–1.4%
C1 Average—Weighted	48	41	–1%
National Power Index	3,874	3,488	–1.4%

Egypt has the second highest percentage of state ownership of media after China, led in particular through the Egyptian Radio and Television Union (ERTU) and the main newspaper groups Al Ahram, Al Akhbar, and Al Gomhouria. ERTU has a legal monopoly over both TV broadcasting and radio, while the three newspaper groups collectively account for nearly 60% of daily newspapers.

In stark contrast to China, however, Egypt is ranked seventh for foreign ownership of media. This is due to mobile communications, where the two main foreign firms present are Vodafone (UK) and Orange (French Telecom), which owns the country's largest media enterprise, Mobinil, together with the domestic company Orascom (Table 29.15).

Table 29–15. Top Platform Media Companies in Egypt

	2004/5		**2011 or Most Recent**		**% Change Annual Average**	
	Company Power Index in Country	**Company Share of the National Platform Media Market (%)**	**Company Power Index in Country**	**Company Share of the National Platform Media Market (%)**	**Company Power Index in Country**	**Company Share of the National Platform Media Market (%)**
Government of Egypt (Telecom Egypt)	4,289	53.3	3,402	47.5	–3.0	–0.8
Mobinil (Orange, France)	1,458	27.4	836	22.6	–6.1	–0.7
Vodafone (UK)	339	13.2	326	15.1	–0.5	0.3
Etisalat (UAE)	0.0	0.0	382	16.1	N/A	2.3
LinkDotNet	81	2.7	69	2.5	–2.1	–0.03

Media Concentration Index	**2004/5**	**2011 or Most Recent**	**% Change Annual Average**
Public Ownership (%)	42.5	46.3	0.9%
Foreign Ownership (%)	51.5	50.3	–0.3%
C4 Average—Weighted	100	100	0%
HHI Average—Weighted	6,954	5,882	–3.9%
C1 Average—Weighted	69.9	63.9	–2.1%
National Power Index	6,721	5,331	–5.2%

Where Egypt's media is diverse is in film production. Egypt has traditionally been the center for Arab filmmaking. This role declined under the Nasser regime when the industry was nationalized, but it re-emerged when private film production was liberalized. The role as a regional center has its drawbacks,
p. 936 however: to be commercially successful, a film has to be ↳

p. 937 ↳

p. 938 ↳

p. 939 ↳

p. 940 ↳

p. 941 ↳

acceptable in many countries with widely different levels of political or social standards, and this often results in bland creations.

Because of Egypt's large population and history as a center content production and distribution in the Middle East, the Nilesat network of communications satellites—owned by the ERTU—are important electronic media distribution systems for several neighboring Arabic-language markets.

p. 935

Egypt—Data Summaries

Egypt's media industries are in transition following the several changes in government since 2011. Due to the limited liberalization of the national media industries prior to 2011, Egypt has the fourth highest weighted average HHI of all the countries surveyed at 5,041 (PI is ranked #5, at 5,071) (Table 29.13). Egypt's newspapers and video channels markets exhibit one of the highest concentrations of state ownership outside of China, a situation that the several regime changes have not altered (Table 29.14). Despite commercialization in the 1990s and 2000s, state regulators and censors wield significant influence over all broadcast and print content.

Table 29-13. National Media Industries Concentration in Egypt (Subsidiary organizations denoted by italics)

	2004/5		2011 or Most Recent		% Change Annual Average	
	Company Power Index in Country	Company Share of the Overall National Media Market (%)	Company Power Index in Country	Company Share of the Overall National Media Market (%)	Company Power Index in Country	Company Share of the Overall National Media Market (%)
Government of Egypt	4,111	51.2	3,311	45.5	–2.8	–0.81
Telecom Egypt (public)	*3,329*	*41.4*	*2,746*	*37.3*	*–2.5*	*–0.58*
Egyptian Radio and Television Union (public)	*428*	*5.1*	*340*	*3.6*	*–2.9*	*–0.22*
Al Ahram (public)	*44*	*1.2*	*10*	*0.44*	*–11.0*	*–0.1*
Al Akhbar (public)	*39*	*1.1*	*15*	*0.5*	*–8.7*	*–0.08*
Nile Television Network (public)	*44*	*1.9*	*7*	*0.7*	*–12.0*	*–0.18*
Al Gomhouria (public)	*12*	*0.61*	*7*	*0.4*	*–5.6*	*–0.03*
Mobinil (Orange, France)	1,132	21.2	704	20.7	–5.4	–0.08
Vodafone (UK)	263	10.2	275	12.7	0.6	0.35
Etisalat (UAE)	0	0.0	322	13.6	N/A	1.9
LinkDotNet	63	2.1	58	2.1	–1.0	0.0
Hayat	0	0.0	11	0.85	N/A	0.1
Google (US)	19	0.2	53	0.6	25.4	0.05
Panorama Action TV	0	0.0	10	0.8	N/A	0.11
ART (Saudi Arabia)	4	0.6	0.2	0.09	–13.4	–0.07
Rotana (Saudi Arabia)	1	0.3	6	0.6	48.3	0.04
MBC (Saudi Arabia)	9	0.8	5	0.6	–5.4	–0.04
Melody Entertainment	0.6	0.2	2	0.4	35.6	0.02
Dream TV	20	1.3	3	0.4	–12.4	–0.1
Al Baraheen (Saudi Arabia)	0	0.0	2	0.4	N/A	0.06
Al Masry Al Youm	0.0	0.02	4	0.3	8,321.9	0.04

Al Mehwar	1.2	0.3	0.8	0.2	–5.4	–0.01
Al Jazeera (Qatar)	3	0.5	0.3	0.1	–13.0	–0.05

Media Concentration Index	**2004/5**	**2011 or Most Recent**	**% Change Annual Average**
Total Revenue: Nat’l Media Industry (mil US$)	4,079	7,979	13.7
Total Voices (*n*)	29	35	3.0
Net Voices (*n*)	26	32	3.3
Public Ownership (%)	51.3	48.3	–0.42
Foreign Ownership (%)	37.1	50.3	1.9
C4 Average—Weighted	92.2	93.6	0.2
HHI Average—Weighted	6,269	5,041	–2.8
C1 Average—Weighted	65	53	–2
Noam Index Average—Weighted	2,729	2,741	0.06
Pooled Overall Sector C4	84.7	92.5	1.1
Pooled Overall Sector HHI	3,186	2,853	–1.5
Pooled Overall Sector Noam Index	385	227	–5.8
Market Share of Top 10 Companies: Nat’l Media Industry (%) (Pooled C10)	89.3	97.9	1.2
National Power Index	5,653	4,774	–2.2

Table 29–14. Top Content Media Companies in Egypt

	2004/5		2011 or Most Recent		% Change Annual Average	
	Company Power Index in Country	**Company Share of the National Content Media Market (%)**	**Company Power Index in Country**	**Company Share of the National Content Media Market (%)**	**Company Power Index in Country**	**Company Share of the National Content Media Market (%)**
Government of Egypt	3,493	44.0	2,828	35.2	–2.7	–1.3
Egyptian Radio and Television Union (Public)	*1,914*	*22.9*	*2,159*	*22.7*	*1.8*	*–0.03*
Al Ahram (public)	*198*	*5.2*	*65*	*2.8*	*–9.6*	*–9.6*
Al Akhbar (Public)	*176*	*4.9*	*97*	*3.4*	*–6.4*	*–0.2*
Nile Television Network (NTN) (Public)	*195*	*8.6*	*44*	*4.4*	*–11.1*	*–0.6*
Al Gomhouria (Public)	*54*	*2.7*	*47*	*2.4*	*–1.9*	*–0.05*
Google (US)	85	0.9	337	3.5	42.1	0.4
Hayat	0.0	0.0	72	5.4	N/A	0.8
Al Baraheen (Saudi Arabia)	0.0	0.0	15	2.5	N/A	0.4
Rotana (Saudi Arabia)	6	13.7	38	49.5	0.7	0.4
MBC (Saudi Arabia)	39	3.8	34	3.7	–0.02	0.0
Al Masry Al Youm	0.03	0.07	28	22.8	118.2	0.3
Dream TV	90	5.7	17	2.6	–0.1	–0.5
Panorama Entertainment TV	0	0.0	60	5.0	N/A	0.7
Melody Entertainment	3	1.0	13	2.3	0.6	0.2
Al Mehwar (public)	6	1.4	5	1.4	–0.02	0.0
Nile Radio Productions	2	0.2	3	0.3	0.07	0.02
ART (Saudi Arabia)	18	2.6	1	0.6	–13.4	–0.3
Al Jazeera (Qatar)	14	2.3	2	0.9	–0.1	–0.2

Media Concentration Index	**2004/5**	**2011 or Most Recent**	**% Change Annual Average**
Public Ownership (%)	44.3	35.5	–1.3%

Foreign Ownership (%)	25.2	21.7	–0.5%
C4 Average—Weighted	65.6	59.6	–0.9%
HHI Average—Weighted	3,893	3,510	–1.4%
C1 Average—Weighted	48	41	–1%
National Power Index	3,874	3,488	–1.4%

Egypt has the second highest percentage of state ownership of media after China, led in particular through the Egyptian Radio and Television Union (ERTU) and the main newspaper groups Al Ahram, Al Akhbar, and Al Gomhouria. ERTU has a legal monopoly over both TV broadcasting and radio, while the three newspaper groups collectively account for nearly 60% of daily newspapers.

In stark contrast to China, however, Egypt is ranked seventh for foreign ownership of media. This is due to mobile communications, where the two main foreign firms present are Vodafone (UK) and Orange (French Telecom), which owns the country's largest media enterprise, Mobinil, together with the domestic company Orascom (Table 29.15).

Table 29–15. Top Platform Media Companies in Egypt

	2004/5		**2011 or Most Recent**		**% Change Annual Average**	
	Company Power Index in Country	**Company Share of the National Platform Media Market (%)**	**Company Power Index in Country**	**Company Share of the National Platform Media Market (%)**	**Company Power Index in Country**	**Company Share of the National Platform Media Market (%)**
Government of Egypt (Telecom Egypt)	4,289	53.3	3,402	47.5	–3.0	–0.8
Mobinil (Orange, France)	1,458	27.4	836	22.6	–6.1	–0.7
Vodafone (UK)	339	13.2	326	15.1	–0.5	0.3
Etisalat (UAE)	0.0	0.0	382	16.1	N/A	2.3
LinkDotNet	81	2.7	69	2.5	–2.1	–0.03

Media Concentration Index	**2004/5**	**2011 or Most Recent**	**% Change Annual Average**
Public Ownership (%)	42.5	46.3	0.9%
Foreign Ownership (%)	51.5	50.3	–0.3%
C4 Average—Weighted	100	100	0%
HHI Average—Weighted	6,954	5,882	–3.9%
C1 Average—Weighted	69.9	63.9	–2.1%
National Power Index	6,721	5,331	–5.2%

Where Egypt's media is diverse is in film production. Egypt has traditionally been the center for Arab filmmaking. This role declined under the Nasser regime when the industry was nationalized, but it re-emerged when private film production was liberalized. The role as a regional center has its drawbacks,
p. 936 however: to be commercially successful, a film has to be ↳

p. 937 ↳

p. 938 ↳

p. 939 ↳

p. 940 ↳

p. 941 ↳
acceptable in many countries with widely different levels of political or social standards, and this often results in bland creations.

Because of Egypt's large population and history as a center content production and distribution in the Middle East, the Nilesat network of communications satellites—owned by the ERTU—are important electronic media distribution systems for several neighboring Arabic-language markets.

Notes

1. Research for this chapter was undertaken during the period July 2011-July 2012. As such, the analysis covers the period following the Mubarak regime up to the rule of the Supreme Council of Armed Forces. The chapter does not cover the period under the presidency of Mohammed Mursi or Abdel Fattah El Sisi, save for brief mention of the 2014 Constitution.
2. I would like to thank Lina Attalah and Mariam El Abd for their invaluable contribution to this research. I am also grateful to the research support of Nagham El Houssamy, Youssef El Shazli and Nadine Weheba. Thanks are also due to all our interviewees. I am particularly indebted to Hisham Kassem for sharing his knowledge and for helping with fact-checking this work.
3. Sharp, Jeremy M. "Egypt, Congress and U.S. Relations." Congressional Research Service. Order Code RL33003. Aug. 12, 2008. Last accessed on June 27, 2012 at <http://fpc.state.gov/documents/organization/109518.pdf>.
4. National Telecom Regulatory Authority (NTRA). "Consumer Protection: 'Know Your Rights' Awareness Campaign." National Telecom Regulatory Authority. Apr. 20, 2010. Last accessed on June 27, 2012 at <http://www.tra.gov.eg/english/dpages_dpagesdetails.asp?ID=469>.
5. Sakr, Naomi. *Arab Television Today*. New York: I. B. Tauris, 2007.
6. Good News Group. "Good News for Radio and TV." Good News Group. 2006. Last accessed on Jan. 16, 2012 at <http://www.goodnewsgroup.com/gng9.swf>.
7. Al Masry Al Youm. "About Al Masry Al Youm." Al Masry Al Youm. Last accessed on Jan. 16, 2012 at <http://www.almasryalyoum.com/>.
8. Attalah, Lina and Rizk, Nagla. "Egypt's Evolving Media Landscape: Access, Public Interest and Control," in *A New Frontier, An Old Landscape*. Report for the Ford Foundation, November 2011, 118–136. Last accessed on January 16, 2012 at <http://-participatorymedia.lab.asu.edu/files/NewFrontierOldLandscape.pdf>.
9. Ibid.
10. "Constitutional Declaration." Cabinet. Last accessed on Mar. 7, 2012 at <http://www.cabinet.gov.eg/AboutEgypt/-Egyptian_constitution.aspx>.
11. "Constitutional Declaration." Cabinet. Last accessed on Mar. 7, 2012 at <http://www.cabinet.gov.eg/AboutEgypt/-Egyptian_constitution.aspx>.
12. Reporters Without Borders. "Country File- Egypt." March 2014. Last accessed on 26 Jan. 2015, at <http://en.rsf.org/report-egypt,149.html>.
13. Penal Code No. 58 of 1937 [Egypt]. August 1937. Last accessed on Mar. 7, 2012 at <http://www.unhcr.org/refworld/docid/3f827fc44.html>.
14. "Egypt: Article 19 and the Justice Initiative Submission to the UN Universal Periodic Review" in the Seventh Session of the UPR Working Group. 2010. Last accessed on Jan. 16, 2012 at <http://www.article19.org/data/files/pdfs/submissions/egypt-article-19-and-the-justice-initiative-submission-to-the-un-universal>.
15. "Urgent Communication to the Egyptian Public Prosecutor a Call for Arresting the Egyptian Minister of Mass Media and Information & Prosecuting Him for Stimulating Hatred and Murder." *The Arab Center for the Independence of the Judiciary and the Legal Profession (ACIJLP)*. 25 Feb. 2011. Last accessed on Jan. 16, 2012 at <http://www.acijlp.org/?browser=view&ID=24'>.
16. "Press Freedom Index%20 Images%20 of%20 Press%20 Freedom%20 Index%20 2007–2012." Explow News. Last accessed on June 4, 2012 at <http://explow.com/Press_Freedom_Index images of press freedom index 2007–2012>.

17. “Egypt Authorities Freeze New Satellite TV Station Licenses.” *X Index*. Sept. 9, 2011. Last accessed on Jan. 16, 2012 at <http://www.indexoncensorship.org/2011/09/egypt-authorities-freeze-new-satellite-tv-station-licenses/>.
18. “Presidential Decree No. 313/1956, Amended by Law 14/1967.” *United Group: Attorneys at Law, Legal Researcher and Human Rights Advocates*. Last accessed on Jan. 16, 2012 at <http://ug-law.com/index.php?option=com_content&view=article&id=424%3ApresidentiAl decree-no-3131956-amended-by-law-no-141967-&catid=64%3Amedia-laws&Itemid=89&lang=en>.
19. Kassem, Hisham. Personal interview. Feb. 21, 2012.
20. Attalah, Lina and Rizk, Nagla. “Egypt’s Evolving Media Landscape: Access, Public Interest and Control,” in A New Frontier, An Old Landscape. Report for the Ford Foundation, November 2011, 118–136. Last accessed on January 16, 2012 at <http://participatorymedia.lab.asu.edu/files/NewFrontierOldLandscape.pdf>.
21. “Facebook Usage Factors and Analysis,” in Arab Social Media Report 1, no. 1. Dubai School of Government, 2011, 6. Last accessed on Mar. 5, 2012 at <http://unpan1.un.org/intradoc/groups/public/documents/dsg/unpan044212.pdf.p.6>.
22. “Egypt Facebook Statistics.” *Social Bakers*. Last accessed on Mar. 5, 2012 at <http://www.socialbakers.com/facebook-statistics/egypt>.
23. “Civil movements: The impact of Facebook and Twitter,” in *Arab Social Media Report* (Vol 1, No. 2). Dubai School of Government, 2011, 16. Last accessed on Mar. 5, 2012 at <http://www.dsg.ae/en/Publication/Pdf_En/DSG_Arab_Social_Media_Report_No_2.pdf. 16>.
24. Attalah, Lina and Rizk, Nagla. “Egypt’s Evolving Media Landscape: Access, Public Interest and Control,” in A New Frontier, An Old Landscape. Report for the Ford Foundation, November 2011, 118–136. Last accessed on January 16, 2012 at <http://participatorymedia.lab.asu.edu/files/NewFrontierOldLandscape.pdf>.
25. World Bank. “Egypt, Arab Rep.” World Bank Development Indicators. Last accessed on Dec. 28, 2011 at <http://data.-worldbank.org/country/egypt-arab-republic>.
26. Egypt: The National Report on Literacy and Adult Education. United Nations Educational, Scientific and Cultural Organization, 2009. Last accessed on Dec. 19, 2011 at <www.unesco.org/fileadmin/MULTIMEDIA/…/UIL/…/Egypt.pdf>.
27. “Egypt.” The World Factbook. Last accessed on Mar. 7, 2012 at <https://www.cia.gov/library/publications/the-world-factbook/geos/eg.html>.
28. “Media Usage.” Insights MENA. 2010. Last accessed on Jan. 16, 2012 at <http://www.insightsmena.com/en/#!place=category&cat=Media+Usage>.
29. Howard, P.N. “Ownership Diversity in Muslim Media Systems.” World Information Access Project (WIA). Oct. 6, 2008. Last accessed on Jan. 16, 2012 at <http://www.wiaproject.org/index.php/68/ownership-diveristy-in-muslim-media-systems>.

1. Research for this chapter was undertaken during the period July 2011-July 2012. As such, the analysis covers the period following the Mubarak regime up to the rule of the Supreme Council of Armed Forces. The chapter does not cover the period under the presidency of Mohammed Mursi or Abdel Fattah El Sisi, save for brief mention of the 2014 Constitution.
2. I would like to thank Lina Attalah and Mariam El Abd for their invaluable contribution to this research. I am also grateful to the research support of Nagham El Houssamy, Youssef El Shazli and Nadine Weheba. Thanks are also due to all our interviewees. I am particularly indebted to Hisham Kassem for sharing his knowledge and for helping with fact-checking this work.
3. Sharp, Jeremy M. “Egypt, Congress and U.S. Relations.” Congressional Research Service. Order Code RL33003. Aug. 12, 2008. Last accessed on June 27, 2012 at <http://fpc.state.gov/documents/organization/109518.pdf>.
4. National Telecom Regulatory Authority (NTRA). “Consumer Protection: ‘Know Your Rights’ Awareness Campaign.” National Telecom Regulatory Authority. Apr. 20, 2010. Last accessed on June 27, 2012 at <http://www.tra.gov.eg/english/dpages_dpagesdetails.asp?ID=469>.
5. Sakr, Naomi. *Arab Television Today*. New York: I. B. Tauris, 2007.
6. Good News Group. “Good News for Radio and TV.” Good News Group. 2006. Last accessed on Jan. 16, 2012 at <http://www.goodnewsgroup.com/gng9.swf>.
7. Al Masry Al Youm. “About Al Masry Al Youm.” Al Masry Al Youm. Last accessed on Jan. 16, 2012 at <http://www.almasryalyoum.com/>.
8. Attalah, Lina and Rizk, Nagla. “Egypt’s Evolving Media Landscape: Access, Public Interest and Control,” in *A New Frontier, An Old Landscape*. Report for the Ford Foundation, November 2011, 118–136. Last accessed on January 16, 2012 at <http://-participatorymedia.lab.asu.edu/files/NewFrontierOldLandscape.pdf>.
9. Ibid.
10. “Constitutional Declaration.” Cabinet. Last accessed on Mar. 7, 2012 at <http://www.cabinet.gov.eg/AboutEgypt/-Egyptian_constitution.aspx>.
11. “Constitutional Declaration.” Cabinet. Last accessed on Mar. 7, 2012 at <http://www.cabinet.gov.eg/AboutEgypt/-Egyptian_constitution.aspx>.
12. Reporters Without Borders. “Country File- Egypt.” March 2014. Last accessed on 26 Jan. 2015, at <http://en.rsf.org/report-egypt,149.html>.
13. Penal Code No. 58 of 1937 [Egypt]. August 1937. Last accessed on Mar. 7, 2012 at <http://www.unhcr.org/refworld/docid/3f827fc44.html>.
14. “Egypt: Article 19 and the Justice Initiative Submission to the UN Universal Periodic Review” in the Seventh Session of the UPR Working Group. 2010. Last accessed on Jan. 16, 2012 at <http://www.article19.org/data/files/pdfs/submissions/egypt-article-19-and-the-justice-initiative-submission-to-the-un-universal>.
15. “Urgent Communication to the Egyptian Public Prosecutor a Call for Arresting the Egyptian Minister of Mass Media and

Information & Prosecuting Him for Stimulating Hatred and Murder.” *The Arab Center for the Independence of the Judiciary and the Legal Profession (ACIJLP)*. 25 Feb. 2011. Last accessed on Jan. 16, 2012 at <http://www.acijlp.org/?browser=view&ID=24’>.
16. “Press Freedom Index%20 Images%20 of%20 Press%20 Freedom%20 Index%20 2007–2012.” Explow News. Last accessed on June 4, 2012 at <http://explow.com/Press_Freedom_Index images of press freedom index 2007–2012>.
17. “Egypt Authorities Freeze New Satellite TV Station Licenses.” *X Index*. Sept. 9, 2011. Last accessed on Jan. 16, 2012 at <http://www.indexoncensorship.org/2011/09/egypt-authorities-freeze-new-satellite-tv-station-licenses/>.
18. “Presidential Decree No. 313/1956, Amended by Law 14/1967.” *United Group: Attorneys at Law, Legal Researcher and Human Rights Advocates*. Last accessed on Jan. 16, 2012 at <http://ug-law.com/index.php?option=com_content&view=article&id=424%3ApresidentiAl decree-no-3131956-amended-by-law-no-141967-&catid=64%3Amedia-laws&Itemid=89&lang=en>.
19. Kassem, Hisham. Personal interview. Feb. 21, 2012.
20. Attalah, Lina and Rizk, Nagla. “Egypt’s Evolving Media Landscape: Access, Public Interest and Control,” in A New Frontier, An Old Landscape. Report for the Ford Foundation, November 2011, 118–136. Last accessed on January 16, 2012 at <http://participatorymedia.lab.asu.edu/files/NewFrontierOldLandscape.pdf>.
21. “Facebook Usage Factors and Analysis,” in Arab Social Media Report 1, no. 1. Dubai School of Government, 2011, 6. Last accessed on Mar. 5, 2012 at <http://unpan1.un.org/intradoc/groups/public/documents/dsg/unpan044212.pdf.p.6>.
22. “Egypt Facebook Statistics.” *Social Bakers*. Last accessed on Mar. 5, 2012 at <http://www.socialbakers.com/facebook-statistics/egypt>.
23. “Civil movements: The impact of Facebook and Twitter,” in *Arab Social Media Report* (Vol 1, No. 2). Dubai School of Government, 2011, 16. Last accessed on Mar. 5, 2012 at <http://www.dsg.ae/en/Publication/Pdf_En/DSG_Arab_Social_Media_Report_No_2.pdf. 16>.
24. Attalah, Lina and Rizk, Nagla. “Egypt’s Evolving Media Landscape: Access, Public Interest and Control,” in A New Frontier, An Old Landscape. Report for the Ford Foundation, November 2011, 118–136. Last accessed on January 16, 2012 at <http://participatorymedia.lab.asu.edu/files/NewFrontierOldLandscape.pdf>.
25. World Bank. “Egypt, Arab Rep.” World Bank Development Indicators. Last accessed on Dec. 28, 2011 at <http://data.worldbank.org/country/egypt-arab-republic>.
26. Egypt: The National Report on Literacy and Adult Education. United Nations Educational, Scientific and Cultural Organization, 2009. Last accessed on Dec. 19, 2011 at <www.unesco.org/fileadmin/MULTIMEDIA/…/UIL/…/Egypt.pdf>.
27. “Egypt.” The World Factbook. Last accessed on Mar. 7, 2012 at <https://www.cia.gov/library/publications/the-world-factbook/geos/eg.html>.
28. “Media Usage.” Insights MENA. 2010. Last accessed on Jan. 16, 2012 at <http://www.insightsmena.com/en/#!place=category&cat=Media+Usage>.
29. Howard, P.N. “Ownership Diversity in Muslim Media Systems.” World Information Access Project (WIA). Oct. 6, 2008. Last accessed on Jan. 16, 2012 at <http://www.wiaproject.org/index.php/68/ownership-diveristy-in-muslim-media-systems>.
30. Rugh, William. A. *Arab Mass Media: Newspapers, Radio & Television in Arab Politics*. Westport, CT: Praeger, 2004. 122.
31. Sakr, Naomi. *Satellite Realms: Transnational Television, Globalization and The Middle East*. New York: I. B. Tauris, 2001. 30.
32. “Egypt: Article 19 and the Justice Initiative Submission to the UN Universal Periodic Review” in the Seventh Session of the UPR Working Group. 2010. Last accessed on Jan. 16, 2012 at <http://www.article19.org/data/files/pdfs/submissions/egypt-article-19-and-the-justice-initiative-submission-to-the-un-universAl p.pdf>.
33. Ibid.
34. Bureau of Democracy, Human Rights and Labor. 2010 Human Rights Report: Egypt. U.S. Department of State, 2011. Last accessed on June 27, 2012 at <http://www.state.gov/documents/organization/160456.pdf>.
35. Kassem, Hisham. Personal interview. Feb. 21, 2012.
36. Black, Jeffrey. “Egypt Press: More Free, Still Fettered.” Arab Media and Society. 2008. Last accessed on Jan. 16, 2012 at <http://www.arabmediasociety.com/?article=572>.
37. “Egypt: Article 19 and the Justice Initiative Submission to the UN Universal Periodic Review” in the Seventh Session of the UPR Working Group. 2010. Last accessed on Jan. 16, 2012 at <http://www.article19.org/data/files/pdfs/submissions/egypt-article-19-and-the-justice-initiative-submission-to-the-un-universAl p.pdf>.
38. Black, Jeffrey. “Egypt Press: More Free, Still Fettered.” Arab Media and Society. 2008. Last accessed on Jan. 16, 2012 at <http://www.arabmediasociety.com/?article=572>.
39. Arab Republic of Egypt. “Constitution of the Arab Republic of Egypt.” 18 January 2014. Last accessed on 26 Jan. 2015, at <http://www.sis.gov.eg/Newvr/Dustor-en001.pdf>.
40. “News Media in Egypt.” Press Reference. Last accessed on Jan. 8, 2012 at <http://www.pressreference.com/Co-Fa/Egypt.html>.
41. “Egypt: Article 19 and the Justice Initiative Submission to the UN Universal Periodic Review” in the Seventh Session of the UPR Working Group. 2010. Last accessed on Jan. 16, 2012 at <http://www.article19.org/data/files/pdfs/submissions/egypt-article-19-and-the-justice-initiative-submission-to-the-un-universAl p.pdf>.
42. Kassem, Hisham. Personal interview. Feb. 21, 2012.
43. El Hefnawy, Magdi. Personal interview. June 30, 2011.
44. Ibid.

45. Ibid.
46. Kassem, Hisham. Personal interview. Feb. 21, 2012.
47. Rugh, William. A. *Arab Mass Media: Newspapers, Radio & Television in Arab Politics*. Westport, CT: Praeger, 2004.
48. El Galad, Magdy. Interview. Al Nas TV. Last accessed on Jan. 16, 2012 at <http://www.youtube.com/watch?v=TSnLjXi2rdI>.
49. The Cairo Institute for Human Rights Studies. *Media in North Africa: Obstacles and challenges*. United Nations Economic Commission for Africa, 2007, 4. Last accessed on Jan. 16, 2012 at <http://www.uneca.org/africanmedia/documents/northafrica-eng-report.pdf.4>.
50. Al Ahram. "About Us." Al Ahram. Last accessed on May 29, 2012 at <http://english.ahram.org.eg/ui/front/aboutus.aspx>.
51. Ibid.
52. Al Gomhouria Newspaper, Last accessed on July 5, 2012 at <http://www.algomhuria.net.eg/algomhuria/today/pdf/>.
53. "Freedom of Expression Project: The Press in Egyptian Legislation" in Middle East and Islamic Studies Collection. Cornell University Library. Last accessed on Jan. 16, 2012 at <http://www.library.cornell.edu/colldev/mideast/egpress.htm>.
54. Ibid.
55. Karlekar, Karen D. and Cook, Sarah G., ed. *Freedom of the Press 2008: A Global Survey of Media Independence*. New York: Rowman and Littlefield Publishers, Inc. 2008, 121
56. Amin, Hussein. *Strengthening the Rule of Law and Integrity in the Arab World: Report on the State of the Media in Egypt*. The Arab Center for the Development of the Rule of Law and Integrity, 2009, 6. Last accessed on June 10, 2012 at <http://www.-arabruleoflaw.org/Files/PDF/Media/English/P2/Egypt_MediaReportP2_En.pdf.6>.
57. Ibid.
58. El Hefnawy, Magdi. Personal interview. June 30, 2011.
59. Amin, Hussein. *Strengthening the Rule of Law and Integrity in the Arab World: Report on the State of the Media in Egypt*. The Arab Center for the Development of the Rule of Law and Integrity, 2009, 6. Last accessed on June 10, 2012 at <http://www.-arabruleoflaw.org/files/pdf/media/english/p2/egypt_mediareportp2_en.pdfp.6>.
60. A view from the field offers a different perspective: publisher Hisham Kassem argues that by 2009 Al Ahram were distributing only 400,000 closer to 40%, and at present revolve round 200,000 (Kassem, Hisham. Personal interview. Feb. 21, 2012).
61. See table for details. Source: Newspaper readership study 2002–2010. Pan Arab Research Center (PARC), 2011.
62. "Al Ahram Establishment Websites." Al Ahram International North America Inc. Limited. Last accessed on Jan. 16, 2012 at <http://aina.ahram.org.eg/ahram usa%5conline ads%5cal-ahram websites.pdf>.
63. El Hefnawy, Magdi Personal interview. June 30, 2011.
64. Ibid.
65. Allam, Rasha. "Media Landscape: Egypt." European Journalism Centre. Nov. 8, 2010. Last accessed on Dec. 29, 2011 at <http://www.ejc.net/media_landscape/article/egypt/>.
66. Rugh, William. A. *Arab Mass Media: Newspapers, Radio & Television in Arab Politics*. Westport, CT: Praeger, 2004. 122.
67. Ibid.
68. Rugh, William. A. *Arab Mass Media: Newspapers, Radio & Television in Arab Politics*. Westport, CT: Praeger, 2004. 122. 127
69. Kassem, Hisham. Personal interview. Feb. 21, 2012.
70. Al Wafd. Official Website. Last accessed on June 27, 2012 at <http://www.alwafd.org/digital/>
71. Ibid.
72. Allam, Rasha. "Media Landscape: Egypt." European Journalism Centre. Nov. 8, 2010. Last accessed on Dec. 29, 2011 at <http://www.ejc.net/media_landscape/article/egypt/>.
73. Rugh, William. A. *Arab Mass Media: Newspapers, Radio & Television in Arab Politics*. Westport, CT: Praeger, 2004.
74. Al Masry Al Youm. "About Al Masry Al Youm." Al Masry Al Youm. Last accessed on Jan. 16, 2012 at <http://www.-almasryalyoum.com/en/node/54>.
75. El Galad, Magdy. Interview. Al Nas TV. Last accessed on Jan. 16, 2012 at <http://www.youtube.com/watch?v=tsnljxi2rdi>.
76. Ibid.
77. Ibid.
78. Al Masry Al Youm. "About Al Masry Al Youm." Al Masry Al Youm. Last accessed on Jan. 16, 2012 at <http://www.-almasryalyoum.com/en/node/54>.
79. "Al Masry Al Youm: Transforming the Egyptian Press." Tavaana. Media Monitor. Jan. 28, 2011. Last accessed on Jan. 16, 2012 at <http://www.tavaana.org/archive.jsp?restrictids=nu_repeatitemid&restrictvalues=20715020003412955527739IO&lang=en>.
80. Al Masry Al Youm. "About Al Masry Al Youm." Al Masry Al Youm. Last accessed on Jan. 16, 2012 at <http://www.-almasryalyoum.com/en/node/54>.
81. A different view on the numbers is offered by veteran publisher Hisham Kassem, who argues that "The circulation of Al Masry Al Youm in the first quarter of 2011 reached 550,000, but is down to 170,000" (Kassem, Hisham. Personal interview. Feb. 21, 2012).
82. GoodNews4Me. "Information." GoodNews4Me. Al Alam Al Youm. Last accessed on Jan. 16, 2012 at <http://www.gn4me.com/alalamalyoum/info.jsp?edition_id=3238>.
83. Good News Group. "Companies" Good News Group. Last accessed on Jan. 16, 2012 at <http://www.goodnewsgroup.com/.
84. Black, Jeffrey. "Egypt Press: More Free, Still Fettered." Arab Media and Society. 2008. Last accessed on Jan. 16, 2012 at <http://www.arabmediasociety.com/?article=572>.
85. Rugh, William. A. *Arab Mass Media: Newspapers, Radio & Television in Arab Politics*. Westport, CT: Praeger, 2004. 127.

86. “Egypt.” Press Freedom and Media Development. Last accessed on Jan. 16, 2012 at <http://www.wan-press.org/pfreedom/articles.php?id=4404>.
87. “Al Dustour.” The Media Briefing. Last accessed on Jan. 16, 2012 at <http://www.themediabriefing.com/products/al dustour/>.
88. “Egypt.” Press Freedom and Media Development. Last accessed on Jan. 16, 2012 at <http://www.wan-press.org/pfreedom/articles.php?id=4404>.
89. Newspaper readership study 192002–2010. Pan Arab Research Center (PARC), 2011.
90. Nasrawi, Saif. “Wafd Party President Buys Al Dustour Newspaper.” Al Masry Al Youm. Aug. 23, 2010. Last accessed on Jan. 16, 2012 at <http://www.almasryalyoum.com/en/node/70155>.
91. “Al Sayed Al Badawy.” Ahram Online. 19 Nov. 2011. Last accessed on Jan. 16, 2012 at <http://english.ahram.org.eg/-NewsContent/33/102/26705/Elections-/Whos-who/AlSayed-AlBadawi.aspx>.
92. “Al Sayed Al Badawy.” Ahram Online. 19 Nov. 2011. Last accessed on Jan. 16, 2012 at <http://english.ahram.org.eg/-NewsContent/33/102/26705/Elections-/Whos-who/AlSayed-AlBadawi.aspx>.
93. Nasrawi, Saif. “Wafd Party President Buys Al Dustour Newspaper.” Al Masry Al Youm. Aug. 23, 2010. Last accessed on Jan. 16, 2012 at <http://www.almasryalyoum.com/en/node/70155>.
30. Rugh, William. A. *Arab Mass Media: Newspapers, Radio & Television in Arab Politics*. Westport, CT: Praeger, 2004. 122.
31. Sakr, Naomi. *Satellite Realms: Transnational Television, Globalization and The Middle East*. New York: I. B. Tauris, 2001. 30.
32. “Egypt: Article 19 and the Justice Initiative Submission to the UN Universal Periodic Review” in the Seventh Session of the UPR Working Group. 2010. Last accessed on Jan. 16, 2012 at <http://www.article19.org/data/files/pdfs/submissions/egypt-article-19-and-the-justice-initiative-submission-to-the-un-universAl p.pdf>.
33. Ibid.
34. Bureau of Democracy, Human Rights and Labor. 2010 Human Rights Report: Egypt. U.S. Department of State, 2011. Last accessed on June 27, 2012 at <http://www.state.gov/documents/organization/160456.pdf>.
35. Kassem, Hisham. Personal interview. Feb. 21, 2012.
36. Black, Jeffrey. “Egypt Press: More Free, Still Fettered.” Arab Media and Society. 2008. Last accessed on Jan. 16, 2012 at <http://www.arabmediasociety.com/?article=572>.
37. “Egypt: Article 19 and the Justice Initiative Submission to the UN Universal Periodic Review” in the Seventh Session of the UPR Working Group. 2010. Last accessed on Jan. 16, 2012 at <http://www.article19.org/data/files/pdfs/submissions/egypt-article-19-and-the-justice-initiative-submission-to-the-un-universAl p.pdf>.
38. Black, Jeffrey. “Egypt Press: More Free, Still Fettered.” Arab Media and Society. 2008. Last accessed on Jan. 16, 2012 at <http://www.arabmediasociety.com/?article=572>.
39. Arab Republic of Egypt. “Constitution of the Arab Republic of Egypt.” 18 January 2014. Last accessed on 26 Jan. 2015, at <http://www.sis.gov.eg/Newvr/Dustor-en001.pdf>.
40. “News Media in Egypt.” Press Reference. Last accessed on Jan. 8, 2012 at <http://www.pressreference.com/Co-Fa/Egypt.html>.
41. “Egypt: Article 19 and the Justice Initiative Submission to the UN Universal Periodic Review” in the Seventh Session of the UPR Working Group. 2010. Last accessed on Jan. 16, 2012 at <http://www.article19.org/data/files/pdfs/submissions/egypt-article-19-and-the-justice-initiative-submission-to-the-un-universAl p.pdf>.
42. Kassem, Hisham. Personal interview. Feb. 21, 2012.
43. El Hefnawy, Magdi. Personal interview. June 30, 2011.
44. Ibid.
45. Ibid.
46. Kassem, Hisham. Personal interview. Feb. 21, 2012.
47. Rugh, William. A. *Arab Mass Media: Newspapers, Radio & Television in Arab Politics*. Westport, CT: Praeger, 2004.
48. El Galad, Magdy. Interview. Al Nas TV. Last accessed on Jan. 16, 2012 at <http://www.youtube.com/watch?v=TSnLjXi2rdI>.
49. The Cairo Institute for Human Rights Studies. *Media in North Africa: Obstacles and challenges*. United Nations Economic Commission for Africa, 2007, 4. Last accessed on Jan. 16, 2012 at <http://www.uneca.org/africanmedia/documents/northafrica-eng-report.pdf.4>.
50. Al Ahram. “About Us.” Al Ahram. Last accessed on May 29, 2012 at <http://english.ahram.org.eg/ui/front/aboutus.aspx>.
51. Ibid.
52. Al Gomhouria Newspaper, Last accessed on July 5, 2012 at <http://www.algomhuria.net.eg/algomhuria/today/pdf/>.
53. “Freedom of Expression Project: The Press in Egyptian Legislation” in Middle East and Islamic Studies Collection. Cornell University Library. Last accessed on Jan. 16, 2012 at <http://www.library.cornell.edu/colldev/mideast/egpress.htm>.
54. Ibid.
55. Karlekar, Karen D. and Cook, Sarah G., ed. *Freedom of the Press 2008: A Global Survey of Media Independence*. New York: Rowman and Littlefield Publishers, Inc. 2008, 121
56. Amin, Hussein. *Strengthening the Rule of Law and Integrity in the Arab World: Report on the State of the Media in Egypt*. The Arab Center for the Development of the Rule of Law and Integrity, 2009, 6. Last accessed on June 10, 2012 at <http://www.-arabruleoflaw.org/Files/PDF/Media/English/P2/Egypt_MediaReportP2_En.pdf.6>.
57. Ibid.

58. El Hefnawy, Magdi. Personal interview. June 30, 2011.
59. Amin, Hussein. *Strengthening the Rule of Law and Integrity in the Arab World: Report on the State of the Media in Egypt*. The Arab Center for the Development of the Rule of Law and Integrity, 2009, 6. Last accessed on June 10, 2012 at <http://www.-arabruleoflaw.org/files/pdf/media/english/p2/egypt_mediareportp2_en.pdfp.6>.
60. A view from the field offers a different perspective: publisher Hisham Kassem argues that by 2009 Al Ahram were distributing only 400,000 closer to 40%, and at present revolve round 200,000 (Kassem, Hisham. Personal interview. Feb. 21, 2012).
61. See table for details. Source: Newspaper readership study 2002–2010. Pan Arab Research Center (PARC), 2011.
62. "Al Ahram Establishment Websites." Al Ahram International North America Inc. Limited. Last accessed on Jan. 16, 2012 at <http://aina.ahram.org.eg/ahram usa%5conline ads%5cal-ahram websites.pdf>.
63. El Hefnawy, Magdi Personal interview. June 30, 2011.
64. Ibid.
65. Allam, Rasha. "Media Landscape: Egypt." European Journalism Centre. Nov. 8, 2010. Last accessed on Dec. 29, 2011 at <http://www.ejc.net/media_landscape/article/egypt/>.
66. Rugh, William. A. *Arab Mass Media: Newspapers, Radio & Television in Arab Politics*. Westport, CT: Praeger, 2004. 122.
67. Ibid.
68. Rugh, William. A. *Arab Mass Media: Newspapers, Radio & Television in Arab Politics*. Westport, CT: Praeger, 2004. 122. 127
69. Kassem, Hisham. Personal interview. Feb. 21, 2012.
70. Al Wafd. Official Website. Last accessed on June 27, 2012 at <http://www.alwafd.org/digital/>
71. Ibid.
72. Allam, Rasha. "Media Landscape: Egypt." European Journalism Centre. Nov. 8, 2010. Last accessed on Dec. 29, 2011 at <http://www.ejc.net/media_landscape/article/egypt/>.
73. Rugh, William. A. *Arab Mass Media: Newspapers, Radio & Television in Arab Politics*. Westport, CT: Praeger, 2004.
74. Al Masry Al Youm. "About Al Masry Al Youm." Al Masry Al Youm. Last accessed on Jan. 16, 2012 at <http://www.-almasryalyoum.com/en/node/54>.
75. El Galad, Magdy. Interview. Al Nas TV. Last accessed on Jan. 16, 2012 at <http://www.youtube.com/watch?v=tsnljxi2rdi>.
76. Ibid.
77. Ibid.
78. Al Masry Al Youm. "About Al Masry Al Youm." Al Masry Al Youm. Last accessed on Jan. 16, 2012 at <http://www.-almasryalyoum.com/en/node/54>.
79. "Al Masry Al Youm: Transforming the Egyptian Press." Tavaana. Media Monitor. Jan. 28, 2011. Last accessed on Jan. 16, 2012 at <http://www.tavaana.org/archive.jsp?restrictids=nu_repeatitemid&restrictvalues=2071502000341295552773910&lang=en>.
80. Al Masry Al Youm. "About Al Masry Al Youm." Al Masry Al Youm. Last accessed on Jan. 16, 2012 at <http://www.-almasryalyoum.com/en/node/54>.
81. A different view on the numbers is offered by veteran publisher Hisham Kassem, who argues that "The circulation of Al Masry Al Youm in the first quarter of 2011 reached 550,000, but is down to 170,000" (Kassem, Hisham. Personal interview. Feb. 21, 2012).
82. GoodNews4Me. "Information." GoodNews4Me. Al Alam Al Youm. Last accessed on Jan. 16, 2012 at <http://www.gn4me.com/alalamalyoum/info.jsp?edition_id=3238>.
83. Good News Group. "Companies" Good News Group. Last accessed on Jan. 16, 2012 at <http://www.goodnewsgroup.com/.
84. Black, Jeffrey. "Egypt Press: More Free, Still Fettered." Arab Media and Society. 2008. Last accessed on Jan. 16, 2012 at <http://www.arabmediasociety.com/?article=572>.
85. Rugh, William. A. *Arab Mass Media: Newspapers, Radio & Television in Arab Politics*. Westport, CT: Praeger, 2004. 127.
86. "Egypt." Press Freedom and Media Development. Last accessed on Jan. 16, 2012 at <http://www.wan-press.org/pfreedom/articles.php?id=4404>.
87. "Al Dustour." The Media Briefing. Last accessed on Jan. 16, 2012 at <http://www.themediabriefing.com/products/al dustour/>.
88. "Egypt." Press Freedom and Media Development. Last accessed on Jan. 16, 2012 at <http://www.wan-press.org/pfreedom/articles.php?id=4404>.
89. Newspaper readership study 192002–2010. Pan Arab Research Center (PARC), 2011.
90. Nasrawi, Saif. "Wafd Party President Buys Al Dustour Newspaper." Al Masry Al Youm. Aug. 23, 2010. Last accessed on Jan. 16, 2012 at <http://www.almasryalyoum.com/en/node/70155>.
91. "Al Sayed Al Badawy." Ahram Online. 19 Nov. 2011. Last accessed on Jan. 16, 2012 at <http://english.ahram.org.eg/-NewsContent/33/102/26705/Elections-/Whos-who/AlSayed-AlBadawi.aspx>.
92. "Al Sayed Al Badawy." Ahram Online. 19 Nov. 2011. Last accessed on Jan. 16, 2012 at <http://english.ahram.org.eg/-NewsContent/33/102/26705/Elections-/Whos-who/AlSayed-AlBadawi.aspx>.
93. Nasrawi, Saif. "Wafd Party President Buys Al Dustour Newspaper." Al Masry Al Youm. Aug. 23, 2010. Last accessed on Jan. 16, 2012 at <http://www.almasryalyoum.com/en/node/70155>.
94. Mekay, Emad. "TV Stations Multiply as Egyptian Censorship Falls." *The New York Times*. July 13, 2011. Last accessed on Jan. 16, 2012 at <http://www.nytimes.com/2011/07/14/world/middleeast/14iht-m14b-egypt-media.html?_r=2&pagewanted=all>.
95. "Target 8." International Telecommunications Union. 2010. Last accessed on July 8, 2012 at <http://www.itu.int/itu-d/ict/publications/wtdr_10/material/wtdr2010_target8_e.pdf. 158>.

96. The Cairo Institute for Human Rights Studies. *Media in North Africa: Obstacles and challenges*. United Nations Economic Commission for Africa, 2007, 4. Last accessed on Jan. 16, 2012 at <http://www.uneca.org/africanmedia/documents/northafrica-eng-report.pdf>.
97. Allam, Rasha. "Media Landscape: Egypt." European Journalism Centre. Nov. 8, 2010. Last accessed on Dec. 29, 2011 at <http://www.ejc.net/media_landscape/article/egypt/>.
98. Allam, Rasha. "Media Landscape: Egypt." European Journalism Centre. Nov. 8, 2010. Last accessed on Dec. 29, 2011 at <http://www.ejc.net/media_landscape/article/egypt/>.
99. Newspaper readership study 2002–2010. Pan Arab Research Center (PARC), 2011.
100. Good News Group. "Companies" Good News Group. Last accessed on Jan. 16, 2012 at <http://www.goodnewsgroup.com/>.
101. Allam, Rasha. "Media Landscape: Egypt." European Journalism Centre. Nov. 8, 2010. Last accessed on Dec. 29, 2011 at <http://www.ejc.net/media_landscape/article/egypt/>.
102. Shahine, Alaa. "New Media Flourish in Egypt." UCLA Center for Communications and Community. Apr. 27, 2004. Last accessed on Jan. 17, 2012 at <http://www.c3.ucla.edu/newsstand/global/new-media-flourish-in-egypt/>.
103. Sakr, Naomi. *Arab Television Today*. New York: I. B. Tauris, 2007. 31.
104. Ibid., 30–31.
105. ERTU. "Sectors." ERTU. Last accessed on Dec. 15, 2011 at <http://ertu.org/1/sectors.asp>.
106. Sout Al Qahira. "About Sout Al Qahira." Sout Al Qahira. Last accessed on Jan. 17, 2012 at <http://www.soutalqahira-eg.com/about-ern.aspx>.
107. "Radio Masr." Facebook Page. Last accessed on Jan. 17, 2012 at <http://www.facebook.com/RadioMasr?sk=info>.
108. Allam, Rasha. "Media Landscape: Egypt." European Journalism Centre. Nov. 8, 2010. Last accessed on Dec. 29, 2011 at <http://www.ejc.net/media_landscape/article/egypt/>.
109. Full Text: Draft Egyptian Broadcast Law. Arab and Media Society, 2008, Article 1, Clause 4. Last accessed June 27, 2012 at <http://www.arabmediasociety.com/articles/downloads/20080729105525_ams6_draft_media_law_english.pdf>.
110. Saleh, Ibrahim. "The Crossing Roads of Egypt: An Avenue of Participation Crucifies the Stagnation Development." *Global Media Journal* 2, no. 4 (2004). Last accessed on June 27, 2012 at <http://lass.calumet.purdue.edu/cca/gmj/oldsitebackup/submitteddocuments/archivedpapers/fall2004/refereed/saleh.htm>.
111. "Egypt: Article 19 and the Justice Initiative Submission to the UN Universal Periodic Review" in the Seventh Session of the UPR Working Group. 2010. Last accessed on Jan. 16, 2012 at <http://www.article19.org/data/files/pdfs/submissions/egypt-article-19-and-the-justice-initiative-submission-to-the-un-universalp.pdf>.
112. Sakr, Naomi. *Arab Television Today*. New York: I. B. Tauris, 2007. 45.
113. "Egypt: Article 19 and the Justice Initiative Submission to the UN Universal Periodic Review" in the Seventh Session of the UPR Working Group. 2010. Last accessed on Jan. 16 2012 at <http://www.article19.org/data/files/pdfs/submissions/egypt-article-19-and-the-justice-initiative-submission-to-the-un-universal p.pdf>.
114. Sakr, Naomi. *Arab Television Today*. New York: I. B. Tauris, 2007. 45.
115. Kotb, Ahmed. "Media Control." Al Ahram Weekly Online, 1056, July 14–20, 2011. Last accessed on Jan. 17, 2012 at <http://weekly.ahram.org.eg/2011/1056/eg692.htm>.
116. Sakr, Naomi. *Satellite Realms: Transnational Television, Globalization and The Middle East*. New York: I. B. Tauris, 2001. 30.
117. Egyptian Television Network. "About Us." Egyptian Television Network (ETN). Last accessed on Jan. 17, 2012 at <http://www.egytv.net/aboutus.aspx>.
118. "The Media Free Zone." Egyptian Media Production City (EMPC). Last accessed on Dec. 29, 2011 at <http://www.empc.com.eg/english/mediafreezone.html>.
119. Ibid.
120. NileSat. "Nilesat Company Profile." NileSat. Last accessed on June 27, 2012 at <http://nilesat.com.eg/banners/aboutus/companyprofile.aspx>.
121. Egyptian Television Network. "About Us." Egyptian Television Network (ETN). Last accessed on Jan. 17, 2012 at <http://www.egytv.net/aboutus.aspx>.
122. Allam, Rasha. "Media Landscape: Egypt." European Journalism Centre. Nov. 8, 2010. Last accessed on Dec. 29, 2011 at <http://www.ejc.net/media_landscape/article/egypt/>.
123. The Cairo Institute for Human Rights Studies. *Media in North Africa: Obstacles and challenges*. United Nations Economic Commission for Africa, 2007, 4. Last accessed on Jan. 16, 2012 at <http://www.uneca.org/africanmedia/documents/northafrica-eng-report.pdf>.
124. Sakr, Naomi. *Arab Television Today*. New York: I. B. Tauris, 2007. 30.
125. IREX. "Media sustainability Index 2005: Middle East and North Africa." IREX. Last accessed on May 24, 2012 at <http://www.irex.org/system/files/msi05_mena_eg.pdf. 26>.
126. Sakr, Naomi. *Arab Television Today*. New York: I. B. Tauris, 2007. 30.
127. Hamdy, Naila. Personal interview. June 10, 2012.
128. Nile Engineering Group. Last accessed on June 10, 2012 at <http://www.nileengineering.com/English/Products–and–Services/NileTel-Stores>.
129. Hamdy, Naila. Personal interview. June 10, 2012.
130. Amin, Hussein. *Strengthening the Rule of Law* and *Integrity in the Arab World: Report on the State of the Media in Egypt*. The Arab Center for the Development of the Rule of Law and Integrity, 2009, 6. Last accessed on June 10, 2012 at <http://www.arabruleoflaw.org/files/pdf/media/english/p2/egypt_mediareportp2_en.pdf>.

131. Hamdy, Naila. Personal interview. June 10, 2012.
132. "The Arab World's Major Pay TV Operators Provide A Choice of 140 Pay TV Channels." AMEinfo. Jan. 15, 2008. Last accessed on Jan. 17, 2012 at <http://www.ameinfo.com/143724.html>.
133. Attia, Tarek. "No More Free TV." Al Ahram Weekly, no. 526. Mar. 22–28, 2001. Last accessed on May 14, 2012 at <http://weekly.ahram.org.eg/2001/526/li3.htm>.
134. In December 2009, six ART sports channels were sold to AlJazeera for $2.75 billion. Source: "Al Jazeera in $2.75bn ART channels deal" Zawya.com (<http://www.zawya.com/story/ZAWYA20091105051037/>).
135. "Press Releases." Pehla: Premium Asian Entertainment. Last accessed on Jan. 17, 2012 at <http://www.pehlatv.net/pehla/PressReleases/54/ADD-launches-Hallmark-channel-on-its-platform>.
136. "TBS Feature Interview: Sheikh Saleh Kamel." Transnational Broadcasting Studies (TBS) Archives. May 1998, 1 (Fall 1998). Last accessed on Jan. 17, 2012 at <http://www.tbsjournal.com/Archives/Fall98/Interviews1/Sheikh_Saleh/sheikh_saleh.html>.
137. Ibid.
138. "Arab Radio and Television Network." Wikipedia. Sept. 21, 2011. Last accessed on Dec. 19, 2012 at <http://en.wikipedia.org/wiki/Arab_Radio_and_Television_Network>.
139. Cochrane, Paul. "Saudi Arabia's Media Influence." Arab Media and Society. 2007. Last accessed on Jan. 17, 2012 at <http://www.arabmediasociety.com/?article=421> and <http://www.insightsmena.com/en/#!place=category&cat=media+usage>.
140. "Industrial Conglomerates: Mawarid Group Company LLC." Bloomberg Businessweek. Last accessed on Jan. 17, 2012 at <http://investing.businessweek.com/research/stocks/private/people.asp?privcapid=22595361>.
141. Sakr, Naomi. *Arab Television Today*. New York: I. B. Tauris, 2007. 5, 196.
142. "Saudi Arabia: Media Market Description" in Worlds Association of Newspapers: World Press Trends 2008. 2008. Last accessed on Jan. 17, 2012 at <http://www.ihudaif.com/wp-content/uploads/2010/01/world-association-of–newspapers—world-press-trends-2008.pdf>.
143. "Showtime Arabia and Orbit Group Merge Pay TV Operations." AMEinfo.com. July 12, 2009. Last accessed on Jan. 17, 2012 at <http://www.ameinfo.com/203504.html>.
144. "Group Companies: Orbit Showtime Network."KIPCO: Kuwait Projects Company (Holding). Last accessed on Jan. 17, 2012 at <http://www.kipco.com/groupcompanies.asp?q_pageid=56>.
145. Newspaper readership study 2002–2010. Pan Arab Research Center (PARC), 2011.
146. Sakr, Naomi. *Arab Television Today*. New York: I. B. Tauris, 2007. 189.
147. Nile Television Network (NTN). Last accessed on June 27, 2012 at <http://www.ntntv.net/>.
148. Sakr, Naomi. "Satellite Television and Development in the Middle East." Middle East Research and Information Project 2010. Last accessed on May 29, 2012 at <http://www.merip.org/mer/mer210/satellite-television-development-middle-east>.
149. Jaafar, A. "Mixed Results for LBC – Rotana: Arab Conglomerate Tries to Compete with MBC." Variety. Oct. 2, 2008. Last accessed on Jan. 17, 2012 at <http://www.variety.com/article/vr1117993363>.
150. Sakr, Naomi. *Arab Television Today*. New York: I. B. Tauris, 2007.
151. Williams, Sean. "Walking the Plank." Arabian Business. Dec. 15, 2010. Last accessed on Jan. 17, 2012 at <http://www.arabianbusiness.com/walking-plank-366838.html>.
152. Fakhredinne, Jihad. "Pan-Arab Satellite Television: Now the Survival Part." Allied Media Corporation. Last accessed on Jan. 17, 2012 at <http://www.allied-media.com/arabtv/pan-arab-sat.htm>.
153. Fandy, Mamoun. *(Un)Civil War of Words: Media and Politics in the Arab World*. Westport, CT: Praeger, 2007. 20.
154. Ibid.
155. Arab Satellite Communications Organization. "About Us. Corporate Governance." Arab Satellite Communications - Organization. Last accessed on June 27, 2012 at <http://www.arabsat.com/pages/arableague.aspx>.
156. NileSat. "Nilesat Company Profile." NileSat. Last accessed on June 27, 2012 at <http://nilesat.com.eg/banners/aboutus/companyprofile.aspx>.
157. Sakr, Naomi. Satellite Realms: Transnational Television, Globalization and The Middle East. New York: I. B. Tauris, 2001.
158. Ibid., 161.
159. "Saudi Arabia Moves its Satellite Channel to Arabsat." Al Masry Al Youm. Sept. 8, 2011. Last accessed on Mar. 12, 2012 at <http://www.almasryalyoum.com/en/node/493638>.
160. Sennitt, Andy. "Al Jazeera Kicked out of Egypt, Nilesat Signal Cut." Media Network. Jan. 30, 2011. Last accessed on June 27, 2012 at <http://blogs.rnw.nl/medianetwork/al-jazeera-kicked-out-of-egypt-nilesat-signal-cut>.
161. Sakr, Naomi. *Satellite Realms: Transnational Television, Globalization and The Middle East*. New York: I. B. Tauris, 2001. 163
162. Hamzawy, Amr and Dunne, Michele. "Media Freedom Restricted as Egyptian Parliamentary Elections Approach." *Carnegie Endowment for International Peace*. Last accessed on Jan. 17, 2012 at <http://egyptelections.carnegieendowment.org/2010/10/25/media-freedom-restricted-as-egyptian-parliamentary-elections-approach>.
163. Allam, Rasha. "Media Landscape: Egypt." European Journalism Centre. Nov. 8, 2010. Last accessed on Dec. 29, 2011 at <http://www.ejc.net/media_landscape/article/egypt/>.
164. Mekay, Emad. "TV Stations Multiply as Egyptian Censorship Falls." *The New York Times*. July 3, 2011. Last accessed on Jan. 16, 2012 at <http://www.nytimes.com/2011/07/14/world/middleeast/14iht-m14b-egypt-media.html?_r=2&pagewanted=all>.
165. Sakr, Naomi. *Arab Television Today*. New York: I. B. Tauris, 2007. 30.
166. Allam, Rasha. "Media Landscape: Egypt." European Journalism Centre. Nov. 8, 2010. Last accessed on Dec. 29, 2011 at

<http://www.ejc.net/media_landscape/article/egypt/>.
167. Sakr, Naomi. *Satellite Realms: Transnational Television, Globalization and The Middle East*. New York: I. B. Tauris, 2001. 32.
168. *Nile Television Network (NTN*). Last accessed on 27 June 2012 at <http://www.ntntv.net/>.
169. State Information Service (SIS). Egypt Yearbook 2007. 2007. Last accessed on July 3, 2012 at <http://www.sis.gov.eg/en/listtemplate.aspx?category_id=870>.
170. State Information Service (SIS). Egypt Yearbook 2007. 2007. Last accessed on July 3, 2012 at <http://www.sis.gov.eg/en/listtemplate.aspx?category_id=870>.
171. Hamdy, Naila. “A Dream TV Come True.” Transnational Broadcasting Studies (TBS), No. 8, (Spring 2002). Last accessed on Jan. 17, 2012 at <http://www.tbsjournal.com/archives/spring02/sirhan.html>.
172. Hamdy, Naila. “El Mehwar the Mercurial.” Transnational Broadcasting Studies (TBS). No. 9, (Fall/Winter 2002). Last accessed on January 17, 2012 at <http://www.tbsjournal.com/archives/fall02/mehwar.html>.
173. Hamdy, Naila. “El Mehwar the Mercurial.” *Transnational Broadcasting Studies* (TBS). *No.* 9, (Fall/Winter 2002). Last accessed on January 17, 2012 at <http://www.tbsjournal.com/archives/fall02/mehwar.html>.
174. Sakr, Naomi. *Arab Television Today*. New York: I. B. Tauris, 2007.
175. “Al Sayed Al Badawy.” Ahram Online. Nov. 19, 2011. Last accessed on Jan. 16, 2012 at <http://english.ahram.org.eg/-newscontent/33/102/26705/elections-/whos-who/alsayed-albadawi.aspx>.
176. Mekay, Emad. “TV Stations Multiply as Egyptian Censorship Falls.” *The New York Times*. July 13, 2011. Last accessed on Jan. 16, 2012 at <http://www.nytimes.com/2011/07/14/world/middleeast/14iht-m14b-egypt-media.html?_r=2&pagewanted=all>.
177. Attalah, Lina and Rizk, Nagla. “Egypt’s Evolving Media Landscape: Access, Public Interest and Control,” in *A New Frontier, An Old Landscape*. Report for the Ford Foundation, November 2011, 118–136. Last accessed on January 16, 2012 at <http://participatorymedia.lab.asu.edu/files/newfrontieroldlandscape.pdf>.
178. Ibid.
179. Solayman, Hanan. “New TV Channels Hit Egypt’s Airwaves.” Daily News Egypt. July 17, 2011. Last accessed on June 27, 2012 at <http://www.thedailynewsegypt.com/new-tv-channels-hit-egypts-airwaves.html>.
180. Sakr, Naomi. Satellite Realms: Transnational Television, Globalization and The Middle East. New York: I. B. Tauris,2001. 33.
181. Kawach, Nadim. “Saudi cleric slams MBC over TV series.” Emirates 24/7. Aug. 18, 2010. Last accessed on May 29, 2012 at <http://www.emirates247.com/entertainment/films-music/saudi-cleric-slams-mbc-over-tv-series-2010–2008-18–11.280816>.
182. “MBC, Largest Media Group in the Middle East Chooses Magnolia as Strategic Platform.” Magnolia. Mar. 9, 2011. Last accessed on May 29, 2012 at <http://www.magnolia-cms.com/our-company/news/press-releases/mbc-usa.html>.
183. “Rotana Launches Egyptian General Entertainment Channel.” June 1, 2011. Arab News. Last accessed on July 5, 2012 at <http://mediame.com/news/broadcasting_news/rotana_launches_egyptian_general_entertainment_channel>.
184. “Murdoch Buys into Rotana.” Arab News. 23 Feb. 2010. Last accessed on Dec. 19, 2011 at <http://arabnews.com/-saudiarabia/article21517.ece>.
185. “Rotana Launches Egyptian General Entertainment Channel.” June 1, 2011. Arab News. Last accessed on July 5, 2012 at <http://mediame.com/news/broadcasting_news/rotana_launches_egyptian_general_entertainment_channel>.
186. “Murdoch Buys into Rotana.” Arab News. 23 Feb. 2010. Last accessed on Dec. 19, 2011 at <http://arabnews.com/-saudiarabia/article21517.ece>.
187. “Rotana Launches Egyptian General Entertainment Channel.” June 1, 2011. Arab News. Last accessed on July 5, 2012 at <http://mediame.com/news/broadcasting_news/rotana_launches_egyptian_general_entertainment_channel>.
188. Sakr, Naomi. *Arab Television Today*. New York: I.B. Tauris, 2007. 122.
189. Ibid.
190. Jaafar, A. “Mixed Results for LBC – Rotana: Arab Conglomerate Tries to Compete with MBC.” Variety. 2 Oct. 2008. Last accessed on Jan. 17, 2012 at <http://www.variety.com/article/vr1117993363>.
191. “Murdoch Buys into Rotana.” Arab News. Feb. 23, 2010. Last accessed on Dec. 19, 2011 at <http://arabnews.com/-saudiarabia/article21517.ece>.
192. Ibid.
193. Ibid.
194. Hagey, Keach. “News Corp Eyes Stake in Saudi Firm Rotana Media.” The National. Sept. 2, 2009. Last accessed on Jan. 17, 2012 at <http://www.thenational.ae/business/media/news-corp-eyes-stake-in-saudi-firm-rotana-media>.
195. “Human Resources Division.” Al Jazeera Network. Last accessed on June 27, 2012 at <http://recruitment.aljazeera.net/english/>.
196. Khalil, Joe. “News Television in the Arabian Gulf . . . Period of Transitions.” Global Media Journal 5, no. 8 (2004).
197. Al Jazeera. “Corporate Profile.” Al Jazeera. Last accessed Dec. 29, 2011 at <http://www.aljazeera.com/aboutus/2006/11/2008525185555444449.html>.
198. “Minister: Al Jazeera Mubasher Misr Shut Down for Disregarding Law.” Al Masry Al Youm. Sept. 12, 2011. Last accessed on Jan. 17, 2012 at <http://www.almasryalyoum.com/en/node/494878>.
199. “Al Jazeera Closed for Operating Unlicensed, Sawiris Considers Qatar-based Channel.” Egypt Independent. Sept. 17, 2011. Al Mary Al Youm. Last accessed on Jan. 17, 2012 at <http://www.almasryalyoum.com/en/node/496619>.
200. Fandy, Mamoun. *(Un)Civil War of Words: Media and Politics in the Arab World*. Westport, CT: Praeger, 2007. 46.
201. Al Rai Media Group. “Al Rai Media Group.” Al Rai Media Group. Last accessed on June 27, 2012 at <http://www.-alraimedia.com/alrai/mediagroup.aspx>.
202. “Al Jazeera Closed for Operating Unlicensed, Sawiris Considers Qatar-based Channel.” Egypt Independent. Sept. 17, 2011. Al Mary Al Youm. Last accessed on Jan. 17, 2012 at <http://www.almasryalyoum.com/en/node/496619>.

203. Mekay, Emad. “TV Stations Multiply as Egyptian Censorship Falls.” *The New York Times*. July 13, 2011. Last accessed on Jan. 16, 2012 at <http://www.nytimes.com/2011/07/14/world/middleeast/14iht-m14b-egypt-media.html?_r=2&pagewanted=all>.

204. Fahim, Joseph. “OTV Hits the Airwaves.” Daily News Egypt. Jan. 30, 2007. Last accessed on Dec. 26, 2011 at <http://www.dailystaregypt.com/article.aspx?articleid=5308>.

205. “Al Jazeera Closed for Operating Unlicensed, Sawiris Considers Qatar-based Channel.” Egypt Independent. Sept. 17, 2011. Al Mary Al Youm. Last accessed on Jan. 17, 2012 at <http://www.almasryalyoum.com/en/node/496619>.

206. “Spotlight.” Melody Holding. Last accessed on June 27, 2012 at <http://www.melodyholding.com/>.

207. Rizk, Nagla. “Stories from Egypt’s Music Industry: De Facto Commons as Alternative to Copyright” in Rizk, Nagla and Shaver, Lea, eds. *Access to Knowledge: New Research on Intellectual Property and Development*. Bloomsbury Academic, 2010, 103. Last accessed on May 29, 2012 at <http://www.aucegypt.edu/business/a2k4d/documents/a2kegypt.pdf>.

208. Field, Nathan and Hamam, Ahmed. “Salafi Satellite TV in Egypt.” Arab Media and Society. 2009. Last accessed on Jan. 8, 2012 at <http://www.arabmediasociety.com/?article=712>.

209. Ibid.

210. Mattar, Eman. “El Hefaz and El Nas TV Channels Halted on TV and El Faraeen Warned.” Business Investment Banking News. Dec. 12, 2010. Last accessed on Jan. 18, 2012 at <http://www.bibnews.com/en/news_details.php?id=5012>.

94. Mekay, Emad. “TV Stations Multiply as Egyptian Censorship Falls.” *The New York Times*. July 13, 2011. Last accessed on Jan. 16, 2012 at <http://www.nytimes.com/2011/07/14/world/middleeast/14iht-m14b-egypt-media.html?_r=2&pagewanted=all>.

95. “Target 8.” International Telecommunications Union. 2010. Last accessed on July 8, 2012 at <http://www.itu.int/itu-d/ict/publications/wtdr_10/material/wtdr2010_target8_e.pdf. 158>.

96. The Cairo Institute for Human Rights Studies. *Media in North Africa: Obstacles and challenges*. United Nations Economic Commission for Africa, 2007, 4. Last accessed on Jan. 16, 2012 at <http://www.uneca.org/africanmedia/documents/northafrica-eng-report.pdf>.

97. Allam, Rasha. “Media Landscape: Egypt.” European Journalism Centre. Nov. 8, 2010. Last accessed on Dec. 29, 2011 at <http://www.ejc.net/media_landscape/article/egypt/>.

98. Allam, Rasha. “Media Landscape: Egypt.” European Journalism Centre. Nov. 8, 2010. Last accessed on Dec. 29, 2011 at <http://www.ejc.net/media_landscape/article/egypt/>.

99. Newspaper readership study 2002–2010. Pan Arab Research Center (PARC), 2011.

100. Good News Group. “Companies” Good News Group. Last accessed on Jan. 16, 2012 at <http://www.goodnewsgroup.com/>.

101. Allam, Rasha. “Media Landscape: Egypt.” European Journalism Centre. Nov. 8, 2010. Last accessed on Dec. 29, 2011 at <http://www.ejc.net/media_landscape/article/egypt/>.

102. Shahine, Alaa. “New Media Flourish in Egypt.” UCLA Center for Communications and Community. Apr. 27, 2004. Last accessed on Jan. 17, 2012 at <http://www.c3.ucla.edu/newsstand/global/new-media-flourish-in-egypt/>.

103. Sakr, Naomi. *Arab Television Today*. New York: I. B. Tauris, 2007. 31.

104. Ibid., 30–31.

105. ERTU. “Sectors.” ERTU. Last accessed on Dec. 15, 2011 at <http://ertu.org/1/sectors.asp>.

106. Sout Al Qahira. “About Sout Al Qahira.” Sout Al Qahira. Last accessed on Jan. 17, 2012 at <http://www.soutalqahira-eg.com/about-ern.aspx>.

107. “Radio Masr.” Facebook Page. Last accessed on Jan. 17, 2012 at <http://www.facebook.com/RadioMasr?sk=info>.

108. Allam, Rasha. “Media Landscape: Egypt.” European Journalism Centre. Nov. 8, 2010. Last accessed on Dec. 29, 2011 at <http://www.ejc.net/media_landscape/article/egypt/>.

109. Full Text: Draft Egyptian Broadcast Law. Arab and Media Society, 2008, Article 1, Clause 4. Last accessed June 27, 2012 at <http://www.arabmediasociety.com/articles/downloads/20080729105525_ams6_draft_media_law_english.pdf>.

110. Saleh, Ibrahim. “The Crossing Roads of Egypt: An Avenue of Participation Crucifies the Stagnation Development.” *Global Media Journal* 2, no. 4 (2004). Last accessed on June 27, 2012 at <http://lass.calumet.purdue.edu/cca/gmj/oldsitebackup/submitteddocuments/archivedpapers/fall2004/refereed/saleh.htm>.

111. “Egypt: Article 19 and the Justice Initiative Submission to the UN Universal Periodic Review” in the Seventh Session of the UPR Working Group. 2010. Last accessed on Jan. 16, 2012 at <http://www.article19.org/data/files/pdfs/submissions/egypt-article-19-and-the-justice-initiative-submission-to-the-un-universalp.pdf>.

112. Sakr, Naomi. *Arab Television Today*. New York: I. B. Tauris, 2007. 45.

113. “Egypt: Article 19 and the Justice Initiative Submission to the UN Universal Periodic Review” in the Seventh Session of the UPR Working Group. 2010. Last accessed on Jan. 16 2012 at <http://www.article19.org/data/files/pdfs/submissions/egypt-article-19-and-the-justice-initiative-submission-to-the-un-universal p.pdf>.

114. Sakr, Naomi. *Arab Television Today*. New York: I. B. Tauris, 2007. 45.

115. Kotb, Ahmed. “Media Control.” Al Ahram Weekly Online, 1056, July 14–20, 2011. Last accessed on Jan. 17, 2012 at <http://weekly.ahram.org.eg/2011/1056/eg692.htm>.

116. Sakr, Naomi. *Satellite Realms: Transnational Television, Globalization and The Middle East*. New York: I. B. Tauris, 2001. 30.

117. Egyptian Television Network. “About Us.” Egyptian Television Network (ETN). Last accessed on Jan. 17, 2012 at <http://www.egytv.net/aboutus.aspx>.

118. “The Media Free Zone.” Egyptian Media Production City (EMPC). Last accessed on Dec. 29, 2011 at <http://www.empc.com.eg/english/mediafreezone.html>.

119. Ibid.
120. NileSat. “Nilesat Company Profile.” NileSat. Last accessed on June 27, 2012 at <http://nilesat.com.eg/banners/aboutus/companyprofile.aspx>.
121. Egyptian Television Network. “About Us.” Egyptian Television Network (ETN). Last accessed on Jan. 17, 2012 at <http://www.egytv.net/aboutus.aspx>.
122. Allam, Rasha. “Media Landscape: Egypt.” European Journalism Centre. Nov. 8, 2010. Last accessed on Dec. 29, 2011 at <http://www.ejc.net/media_landscape/article/egypt/>.
123. The Cairo Institute for Human Rights Studies. *Media in North Africa: Obstacles and challenges*. United Nations Economic Commission for Africa, 2007, 4. Last accessed on Jan. 16, 2012 at <http://www.uneca.org/africanmedia/documents/northafrica-eng-report.pdf>.
124. Sakr, Naomi. *Arab Television Today*. New York: I. B. Tauris, 2007. 30.
125. IREX. “Media sustainability Index 2005: Middle East and North Africa.” IREX. Last accessed on May 24, 2012 at <http://www.irex.org/system/files/msi05_mena_eg.pdf. 26>.
126. Sakr, Naomi. *Arab Television Today*. New York: I. B. Tauris, 2007. 30.
127. Hamdy, Naila. Personal interview. June 10, 2012.
128. Nile Engineering Group. Last accessed on June 10, 2012 at <http://www.nileengineering.com/English/Products–and–Services/NileTel-Stores>.
129. Hamdy, Naila. Personal interview. June 10, 2012.
130. Amin, Hussein. *Strengthening the Rule of Law* and *Integrity in the Arab World: Report on the State of the Media in Egypt*. The Arab Center for the Development of the Rule of Law and Integrity, 2009, 6. Last accessed on June 10, 2012 at <http://www.-arabruleoflaw.org/files/pdf/media/english/p2/egypt_mediareportp2_en.pdf>.
131. Hamdy, Naila. Personal interview. June 10, 2012.
132. “The Arab World’s Major Pay TV Operators Provide A Choice of 140 Pay TV Channels.” AMEinfo. Jan. 15, 2008. Last accessed on Jan. 17, 2012 at <http://www.ameinfo.com/143724.html>.
133. Attia, Tarek. “No More Free TV.” Al Ahram Weekly, no. 526. Mar. 22–28, 2001. Last accessed on May 14, 2012 at <http://weekly.ahram.org.eg/2001/526/li3.htm>.
134. In December 2009, six ART sports channels were sold to AlJazeera for $2.75 billion. Source: “Al Jazeera in $2.75bn ART channels deal” Zawya.com (<http://www.zawya.com/story/ZAWYA20091105051037/>).
135. “Press Releases.” Pehla: Premium Asian Entertainment. Last accessed on Jan. 17, 2012 at <http://www.pehlatv.net/pehla/PressReleases/54/ADD-launches-Hallmark-channel-on-its-platform>.
136. “TBS Feature Interview: Sheikh Saleh Kamel.” Transnational Broadcasting Studies (TBS) Archives. May 1998, 1 (Fall 1998). Last accessed on Jan. 17, 2012 at <http://www.tbsjournal.com/Archives/Fall98/Interviews1/Sheikh_Saleh/sheikh_saleh.html>.
137. Ibid.
138. “Arab Radio and Television Network.” Wikipedia. Sept. 21, 2011. Last accessed on Dec. 19, 2012 at <http://en.wikipedia.org/wiki/Arab_Radio_and_Television_Network>.
139. Cochrane, Paul. “Saudi Arabia’s Media Influence.” Arab Media and Society. 2007. Last accessed on Jan. 17, 2012 at <http://www.arabmediasociety.com/?article=421> and <http://www.insightsmena.com/en/#!place=category&cat=media+usage>.
140. “Industrial Conglomerates: Mawarid Group Company LLC.” Bloomberg Businessweek. Last accessed on Jan. 17, 2012 at <http://investing.businessweek.com/research/stocks/private/people.asp?privcapid=22595361>.
141. Sakr, Naomi. *Arab Television Today*. New York: I. B. Tauris, 2007. 5, 196.
142. “Saudi Arabia: Media Market Description” in Worlds Association of Newspapers: World Press Trends 2008. 2008. Last accessed on Jan. 17, 2012 at <http://www.ihudaif.com/wp-content/uploads/2010/01/world-association-of–newspapers—world-press-trends-2008.pdf>.
143. “Showtime Arabia and Orbit Group Merge Pay TV Operations.” AMEinfo.com. July 12, 2009. Last accessed on Jan. 17, 2012 at <http://www.ameinfo.com/203504.html>.
144. “Group Companies: Orbit Showtime Network.”KIPCO: Kuwait Projects Company (Holding). Last accessed on Jan. 17, 2012 at <http://www.kipco.com/groupcompanies.asp?q_pageid=56>.
145. Newspaper readership study 2002–2010. Pan Arab Research Center (PARC), 2011.
146. Sakr, Naomi. *Arab Television Today*. New York: I. B. Tauris, 2007. 189.
147. Nile Television Network (NTN). Last accessed on June 27, 2012 at <http://www.ntntv.net/>.
148. Sakr, Naomi. “Satellite Television and Development in the Middle East.” Middle East Research and Information Project 2010. Last accessed on May 29, 2012 at <http://www.merip.org/mer/mer210/satellite-television-development-middle-east>.
149. Jaafar, A. “Mixed Results for LBC – Rotana: Arab Conglomerate Tries to Compete with MBC.” Variety. Oct. 2, 2008. Last accessed on Jan. 17, 2012 at <http://www.variety.com/article/vr1117993363>.
150. Sakr, Naomi. *Arab Television Today*. New York: I. B. Tauris, 2007.
151. Williams, Sean. “Walking the Plank.” Arabian Business. Dec. 15, 2010. Last accessed on Jan. 17, 2012 at <http://www.arabianbusiness.com/walking-plank-366838.html>.
152. Fakhredinne, Jihad. “Pan-Arab Satellite Television: Now the Survival Part.” Allied Media Corporation. Last accessed on Jan. 17, 2012 at <http://www.allied-media.com/arabtv/pan-arab-sat.htm>.
153. Fandy, Mamoun. *(Un)Civil War of Words: Media and Politics in the Arab World*. Westport, CT: Praeger, 2007. 20.
154. Ibid.
155. Arab Satellite Communications Organization. “About Us. Corporate Governance.” Arab Satellite Communications -

Organization. Last accessed on June 27, 2012 at <http://www.arabsat.com/pages/arableague.aspx>.
156. NileSat. "Nilesat Company Profile." NileSat. Last accessed on June 27, 2012 at <http://nilesat.com.eg/banners/aboutus/companyprofile.aspx>.
157. Sakr, Naomi. Satellite Realms: Transnational Television, Globalization and The Middle East. New York: I. B. Tauris, 2001.
158. Ibid., 161.
159. "Saudi Arabia Moves its Satellite Channel to Arabsat." Al Masry Al Youm. Sept. 8, 2011. Last accessed on Mar. 12, 2012 at <http://www.almasryalyoum.com/en/node/493638>.
160. Sennitt, Andy. "Al Jazeera Kicked out of Egypt, Nilesat Signal Cut." Media Network. Jan. 30, 2011. Last accessed on June 27, 2012 at <http://blogs.rnw.nl/medianetwork/al-jazeera-kicked-out-of-egypt-nilesat-signal-cut>.
161. Sakr, Naomi. *Satellite Realms: Transnational Television, Globalization and The Middle East*. New York: I. B. Tauris, 2001. 163
162. Hamzawy, Amr and Dunne, Michele. "Media Freedom Restricted as Egyptian Parliamentary Elections Approach." *Carnegie Endowment for International Peace*. Last accessed on Jan. 17, 2012 at <http://egyptelections.carnegieendowment.org/2010/10/25/media-freedom-restricted-as-egyptian-parliamentary-elections-approach>.
163. Allam, Rasha. "Media Landscape: Egypt." European Journalism Centre. Nov. 8, 2010. Last accessed on Dec. 29, 2011 at <http://www.ejc.net/media_landscape/article/egypt/>.
164. Mekay, Emad. "TV Stations Multiply as Egyptian Censorship Falls." *The New York Times*. July 3, 2011. Last accessed on Jan. 16, 2012 at <http://www.nytimes.com/2011/07/14/world/middleeast/14iht-m14b-egypt-media.html?_r=2&pagewanted=all>.
165. Sakr, Naomi. *Arab Television Today*. New York: I. B. Tauris, 2007. 30.
166. Allam, Rasha. "Media Landscape: Egypt." European Journalism Centre. Nov. 8, 2010. Last accessed on Dec. 29, 2011 at <http://www.ejc.net/media_landscape/article/egypt/>.
167. Sakr, Naomi. *Satellite Realms: Transnational Television, Globalization and The Middle East*. New York: I. B. Tauris, 2001. 32.
168. *Nile Television Network (NTN)*. Last accessed on 27 June 2012 at <http://www.ntntv.net/>.
169. State Information Service (SIS). Egypt Yearbook 2007. 2007. Last accessed on July 3, 2012 at <http://www.sis.gov.eg/en/listtemplate.aspx?category_id=870>.
170. State Information Service (SIS). Egypt Yearbook 2007. 2007. Last accessed on July 3, 2012 at <http://www.sis.gov.eg/en/listtemplate.aspx?category_id=870>.
171. Hamdy, Naila. "A Dream TV Come True." Transnational Broadcasting Studies (TBS), No. 8, (Spring 2002). Last accessed on Jan. 17, 2012 at <http://www.tbsjournal.com/archives/spring02/sirhan.html>.
172. Hamdy, Naila. "El Mehwar the Mercurial." Transnational Broadcasting Studies (TBS). No. 9, (Fall/Winter 2002). Last accessed on January 17, 2012 at <http://www.tbsjournal.com/archives/fall02/mehwar.html>.
173. Hamdy, Naila. "El Mehwar the Mercurial." *Transnational Broadcasting Studies* (TBS). *No*. 9, (Fall/Winter 2002). Last accessed on January 17, 2012 at <http://www.tbsjournal.com/archives/fall02/mehwar.html>.
174. Sakr, Naomi. *Arab Television Today*. New York: I. B. Tauris, 2007.
175. "Al Sayed Al Badawy." Ahram Online. Nov. 19, 2011. Last accessed on Jan. 16, 2012 at <http://english.ahram.org.eg/-newscontent/33/102/26705/elections-/whos-who/alsayed-albadawi.aspx>.
176. Mekay, Emad. "TV Stations Multiply as Egyptian Censorship Falls." *The New York Times*. July 13, 2011. Last accessed on Jan. 16, 2012 at <http://www.nytimes.com/2011/07/14/world/middleeast/14iht-m14b-egypt-media.html?_r=2&pagewanted=all>.
177. Attalah, Lina and Rizk, Nagla. "Egypt's Evolving Media Landscape: Access, Public Interest and Control," in *A New Frontier, An Old Landscape*. Report for the Ford Foundation, November 2011, 118–136. Last accessed on January 16, 2012 at <http://participatorymedia.lab.asu.edu/files/newfrontieroldlandscape.pdf>.
178. Ibid.
179. Solayman, Hanan. "New TV Channels Hit Egypt's Airwaves." Daily News Egypt. July 17, 2011. Last accessed on June 27, 2012 at <http://www.thedailynewsegypt.com/new-tv-channels-hit-egypts-airwaves.html>.
180. Sakr, Naomi. Satellite Realms: Transnational Television, Globalization and The Middle East. New York: I. B. Tauris,2001. 33.
181. Kawach, Nadim. "Saudi cleric slams MBC over TV series." Emirates 24/7. Aug. 18, 2010. Last accessed on May 29, 2012 at <http://www.emirates247.com/entertainment/films-music/saudi-cleric-slams-mbc-over-tv-series-2010–2008-18–11.280816>.
182. "MBC, Largest Media Group in the Middle East Chooses Magnolia as Strategic Platform." Magnolia. Mar. 9, 2011. Last accessed on May 29, 2012 at <http://www.magnolia-cms.com/our-company/news/press-releases/mbc-usa.html>.
183. "Rotana Launches Egyptian General Entertainment Channel." June 1, 2011. Arab News. Last accessed on July 5, 2012 at <http://mediame.com/news/broadcasting_news/rotana_launches_egyptian_general_entertainment_channel>.
184. "Murdoch Buys into Rotana." Arab News. 23 Feb. 2010. Last accessed on Dec. 19, 2011 at <http://arabnews.com/-saudiarabia/article21517.ece>.
185. "Rotana Launches Egyptian General Entertainment Channel." June 1, 2011. Arab News. Last accessed on July 5, 2012 at <http://mediame.com/news/broadcasting_news/rotana_launches_egyptian_general_entertainment_channel>.
186. "Murdoch Buys into Rotana." Arab News. 23 Feb. 2010. Last accessed on Dec. 19, 2011 at <http://arabnews.com/-saudiarabia/article21517.ece>.
187. "Rotana Launches Egyptian General Entertainment Channel." June 1, 2011. Arab News. Last accessed on July 5, 2012 at <http://mediame.com/news/broadcasting_news/rotana_launches_egyptian_general_entertainment_channel>.
188. Sakr, Naomi. *Arab Television Today*. New York: I.B. Tauris, 2007. 122.
189. Ibid.
190. Jaafar, A. "Mixed Results for LBC – Rotana: Arab Conglomerate Tries to Compete with MBC." Variety. 2 Oct. 2008. Last

accessed on Jan. 17, 2012 at <http://www.variety.com/article/vr1117993363>.

191. “Murdoch Buys into Rotana.” Arab News. Feb. 23, 2010. Last accessed on Dec. 19, 2011 at <http://arabnews.com/-saudiarabia/article21517.ece>.

192. Ibid.

193. Ibid.

194. Hagey, Keach. “News Corp Eyes Stake in Saudi Firm Rotana Media.” The National. Sept. 2, 2009. Last accessed on Jan. 17, 2012 at <http://www.thenational.ae/business/media/news-corp-eyes-stake-in-saudi-firm-rotana-media>.

195. “Human Resources Division.” Al Jazeera Network. Last accessed on June 27, 2012 at <http://recruitment.aljazeera.net/english/>.

196. Khalil, Joe. “News Television in the Arabian Gulf . . . Period of Transitions.” Global Media Journal 5, no. 8 (2004).

197. Al Jazeera. “Corporate Profile.” Al Jazeera. Last accessed Dec. 29, 2011 at <http://www.aljazeera.com/aboutus/2006/11/2008525185555444449.html>.

198. “Minister: Al Jazeera Mubasher Misr Shut Down for Disregarding Law.” Al Masry Al Youm. Sept. 12, 2011. Last accessed on Jan. 17, 2012 at <http://www.almasryalyoum.com/en/node/494878>.

199. “Al Jazeera Closed for Operating Unlicensed, Sawiris Considers Qatar-based Channel.” Egypt Independent. Sept. 17, 2011. Al Mary Al Youm. Last accessed on Jan. 17, 2012 at <http://www.almasryalyoum.com/en/node/496619>.

200. Fandy, Mamoun. *(Un)Civil War of Words: Media and Politics in the Arab World*. Westport, CT: Praeger, 2007. 46.

201. Al Rai Media Group. “Al Rai Media Group.” Al Rai Media Group. Last accessed on June 27, 2012 at <http://www.-alraimedia.com/alrai/mediagroup.aspx>.

202. “Al Jazeera Closed for Operating Unlicensed, Sawiris Considers Qatar-based Channel.” Egypt Independent. Sept. 17, 2011. Al Mary Al Youm. Last accessed on Jan. 17, 2012 at <http://www.almasryalyoum.com/en/node/496619>.

203. Mekay, Emad. “TV Stations Multiply as Egyptian Censorship Falls.” *The New York Times*. July 13, 2011. Last accessed on Jan. 16, 2012 at <http://www.nytimes.com/2011/07/14/world/middleeast/14iht-m14b-egypt-media.html?_r=2&pagewanted=all>.

204. Fahim, Joseph. “OTV Hits the Airwaves.” Daily News Egypt. Jan. 30, 2007. Last accessed on Dec. 26, 2011 at <http://www.dailystaregypt.com/article.aspx?articleid=5308>.

205. “Al Jazeera Closed for Operating Unlicensed, Sawiris Considers Qatar-based Channel.” Egypt Independent. Sept. 17, 2011. Al Mary Al Youm. Last accessed on Jan. 17, 2012 at <http://www.almasryalyoum.com/en/node/496619>.

206. “Spotlight.” Melody Holding. Last accessed on June 27, 2012 at <http://www.melodyholding.com/>.

207. Rizk, Nagla. “Stories from Egypt’s Music Industry: De Facto Commons as Alternative to Copyright” in Rizk, Nagla and Shaver, Lea, eds. *Access to Knowledge: New Research on Intellectual Property and Development*. Bloomsbury Academic, 2010, 103. Last accessed on May 29, 2012 at <http://www.aucegypt.edu/business/a2k4d/documents/a2kegypt.pdf>.

208. Field, Nathan and Hamam, Ahmed. “Salafi Satellite TV in Egypt.” Arab Media and Society. 2009. Last accessed on Jan. 8, 2012 at <http://www.arabmediasociety.com/?article=712>.

209. Ibid.

210. Mattar, Eman. “El Hefaz and El Nas TV Channels Halted on TV and El Faraeen Warned.” Business Investment Banking News. Dec. 12, 2010. Last accessed on Jan. 18, 2012 at <http://www.bibnews.com/en/news_details.php?id=5012>.

211. Rao, Madanmohan. Mobile Africa Report 2011: Regional Hubs of Excellence and Innovation. MobileMonday, 2011. Last accessed on Jan. 18, 2012 at <http://www.mobilemonday.net/reports/mobileafrica_2011.pdf>.

212. El Azhary, Emad. Personal interview. Nov. 24, 2011.

213. Egypt: The National Report on Literacy and Adult Education. United Nations Educational, Scientific and Cultural Organization, 2009. Last accessed on Dec. 19, 2011 at<www.unesco.org/fileadmin/multimedia/…/uil/…/egypt.pdf>.

214. Saleh, Nivien. Third World Citizens and the Information Technology Revolution. New York: Palgrave Macmillan, 2010.

215. Telecom Egypt. “Basic Information.” Telecom Egypt. Last accessed Nov. 27, 2011 at <http://ir.telecomegypt.com.eg/basic information.asp#>.

216. Telecom Egypt. “Company Profile.” Telecom Egypt. Last accessed on Nov. 27, 2011 at <http://ir.telecomegypt.com.eg/basic information.asp#>.

217. Ibid.

218. MCIT. Ministry of Communications and Information Technology eProtal. Last accessed on Nov. 29, 2011 at <http://www.mcit.gov.eg/telecommunications/historical_prespective>.

219. National Telecom Regulatory Authority (NTRA). “About Us.” National Telecom Regulatory Authority (NTRA). Last accessed on June 27, 2012 at <http://www.tra.gov.eg/english/dpages_dpagesdetails.asp?id=180&menu=5>.

220. National Telecom Regulatory Authority (NTRA). “Media Convergence Issues in Egypt and the Region and Prospects for the Future.” Scribd. 2009. Last accessed Nov. 27, 2011 at <www.scribd.com/doc/38482708/doc9-ntra>.

221. Telecom Egypt, “Annual Report 2009: Equipped For A New Era,” Giza, 2009, 24. Last accessed on Nov. 27, 2011 at <http://ir.telecomegypt.com.eg/admin/uploads/annual-report-2009/final%20 annual%20web.pdf. 24>.

222. Telecom Egypt. “Wholesale.” Telecom Egypt. 2008. Last accessed on Jan. 3, 2012 at <http://www.telecomegypt.com.eg/english/wholesale_mpls_ip-vpn.asp#>.

223. Telecom Egypt, “Annual Report 2009: Equipped For A New Era,” Giza, 2009, 24. Last accessed on Nov. 27, 2011 at <http://ir.telecomegypt.com.eg/admin/uploads/annual-report-2009/final%20 annual%20 web.pdfp.24>.

224. Saleh, Nivien. *Third World Citizens and the Information Technology Revolution*. New York: Palgrave Macmillan, 2010. 147.

225. Saleh, Nivien. *Third World Citizens and the Information Technology Revolution*. New York: Palgrave Macmillan, 2010. 148–149.

226. K&M Engineering and Consulting Corporation. “ARENTO Cost of Service Study.” USAID. National Telecommunications

Organization & the U.S. Agency for International Development, 2011, 105. Last accessed on Dec. 19, 2011 at <http://pdf.usaid.gov/pdf_docs/pnabs218.pdf>.
227. Ibid.
228. El Azhary, Emad. Personal interview. Nov. 24, 2011.
229. Saleh, Nivien. *Third World Citizens and the Information Technology Revolution*. New York: Palgrave Macmillan, 2010.
230. Ibid.
231. Telecom Egypt. “Ownership Structure.” Telecom Egypt. Last accessed on June 27, 2012 at <http://telecom.tedata.net/uipages/ownership_structure.aspx>.
232. Telecom Egypt. “Company Milestones.” Telecom Egypt. Last accessed on June 27, 2012 at <http://ir.telecomegypt.com.eg/company%20 milestones.asp>.
233. Telecom Egypt. “Company Fact Sheet.” Telecom Egypt. Last accessed on June 27, 2012 at <http://ir.telecomegypt.com.eg/company%20 fact%20 sheets.asp>.
234. “Subsidiaries and Investments.” Telecom Egypt. Last accessed on June 27, 2012 at <http://ir.telecomegypt.com.eg/-subsidiaries.asp>.
235. El Azhary, Emad. Personal interview. Nov. 24, 2011.
236. Telecom Egypt. “Company Fact Sheet.” Telecom Egypt. Last accessed on June 27, 2012 at <http://ir.telecomegypt.com.eg/company%20 fact%20 sheets.asp>.
237. Reuters. “Egypt to Auction 2nd Fixed-line License on June 19.” Balancing Act Africa, no. 394. Last accessed on Jan. 4, 2012 at <http://www.balancingact-africa.com/news/en/issue-no-394/telecoms/egypt-to-auction-2nd/en>.
238. National Telecom Regulatory Authority (NRTA). “The NTRA Offering the Second Fixed-Line License.” National Telecommunications Regulatory Authority. Last accessed on Dec. 19, 2011 at <http://www.tra.gov.eg/english/news_newsdetails.asp?pid=36&id=129>.
239. Middle East Rating and Investors Service. “Egyptian Company for Mobile Services S.A.E (Mobinil).” Merisratings.com. November 2009. Last accessed Jan. 10, 2011 at <http://www.mobinil.com/investors/financialreports/doc/creditrating-reportnov092ndissue.pdf>.
240. Ibid.
241. National Telecom Regulatory Authority (NRTA). “The NTRA Offering the Second Fixed-Line License.” National Telecommunications Regulatory Authority. Last accessed on Dec. 19, 2011 at <http://www.tra.gov.eg/english/news_newsdetails.asp?pid=36&id=129>.
242. Ibid.
243. El Azhary, Emad. Personal interview. Nov. 24, 2011.
244. “Subsidiaries and Investments.” Telecom Egypt. Last accessed on June 27, 2012 at <http://ir.telecomegypt.com.eg/-subsidiaries.asp>.
245. Hassanein, Leila. “Access to Infrastructure: Egypt.” GISWatch. 2008. Last accessed Dec. 22, 2010 at <http://www.giswatch.org/sites/default/files/egypt_0.pdf>.
246. Saleh, Nivien. *Third World Citizens and the Information Technology Revolution*. New York: Palgrave Macmillan, 2010.
247. Al Bawaba. “Click to Become IPO in Egypt.” Al Bawaba News. May 2, 2001. Last accessed on 18 Dec. 2011 at <http://www.albawaba.com/news/click-gsm-become-ipo-egypt>.
248. Hassanein, Leila. “Access to Infrastructure: Egypt.” GISWatch. 2008. Last accessed Dec. 22, 2010 at <http://www.giswatch.org/sites/default/files/egypt_0.pdf>.
249. Kotler, P and Armstrong, Gray, eds. “Pricing: Understanding and Capturing Customer Value.” In *Principles of Marketing*. New York: Pearson Prentice Hall, 2012. Last accessed on June 27, 2012 at <http://catalogue.pearsoned.co.uk/assets/hip/gb/hip_gb_pearsonhighered/samplechapter/0273752502.pdf>.
250. Ibid.
251. Etisalat. “Corporate Information.” *Etisalat*. Last accessed June 27, 2012 at <http://etisalat.com.eg/etisalat/-etisalat_portal_en/about/corporate.htm?_pageid=42,1&_dad=portal&_schema=portal&sitealias=etisalat&sitepath=etisalat_portal_en&kpalias=about&pagealias=corporate>.
252. Kotler, P and Armstrong, Gray, eds. “Pricing: Understanding and Capturing Customer Value.” In *Principles of Marketing*. New York: Pearson Prentice Hall, 2012. Last accessed on June 27, 2012 at<http://catalogue.pearsoned.co.uk/assets/hip/gb/hip_gb_pearsonhighered/samplechapter/0273752502.pdf>.
253. Etisalat. “Corporate Information.” *Etisalat*. Last accessed June 27, 2012 at <http://etisalat.com.eg/etisalat/etisalat_portal_en/about/corporate.htm?_pageid=42,1&_dad=portal&_schema=portal&sitealias=etisalat&sitepath=etisalat_portal_en&kpalias=about&pagealias=corporate>.
254. “Telecom Watchdog Decision Clears Way for 4th Egyptian Mobile Operator.” Ahram Online. May 7, 2012. Last accessed on June 4, 2012 at <http://english.ahram.org.eg/newscontent/3/12/40995/business/economy/telecom-watchdog-decision-clears-way-for-th-egypti.aspx>.
255. “Telecom Watchdog Decision Clears Way for 4th Egyptian Mobile Operator.” Ahram Online. May 7, 2012. Last accessed on June 4, 2012 at <http://english.ahram.org.eg/newscontent/3/12/40995/business/economy/telecom-watchdog-decision-clears-way-for-th-egypti.aspx>.
256. Ministry of Communications and Information Technology (MCIT). “ICT Infrastructure and Access.” Egypt ICT Indicators. Last accessed on Jan. 5, 2012 at <http://www.new.egyptictindicators.gov.eg/en/indicators/_layouts/keyindicatorsviewer.aspx>.
257. Mobinil. “Annual Report 2010: Egyptian Company for Mobile Services (ECMS).” Mobinil. Last accessed on June 27, 2012 at

<http://www.mobinil.com/investors/annualreport2010.aspx>.
258. Sahota, Dawinderpal. "France Telecom Increases Stake in Egypt's Mobinil." Telecoms.com, Feb. 13, 2012. Last accessed on July 27, 2012 at <http://www.telecoms.com/tag/mobinil/>.
259. "An Overly French Mobinil." Egypt Independent, no. 4, June 7, 2012, 11. Last accessed on June 27, 2012 at <http://www.scribd.com/doc/96300554/egypt-independent-jun-07>.
260. Orascom Telecom. "Our History." Orascom Telecom. Last accessed on June 27, 2012 at <http://www.orascomtelecom.com/about/contents/default.aspx?id=395>.
261. Mobinil. "Annual Report 2010: Egyptian Company for Mobile Services (ECMS)." Mobinil. Last accessed on June 27, 2012 at <http://www.mobinil.com/investors/annualreport2010.aspx>.
262. "The Dispute over the Ownership of Egypt's Mobinil." *International Telecommunications Union Regulation Toolkit*.Dec. 22, 2011. International Telecommunications Union. Last accessed on July 27, 2011 at <http://www.ictregulationtoolkit.org/en/PracticeNote.3264.html>.
263. Middle East Rating and Investors Service. "Egyptian Company for Mobile Services S.A.E (Mobinil)." Merisratings.com. November 2009. Last accessed Jan. 10, 2011 at <http://www.mobinil.com/investors/financialreports/doc/creditrating-reportnov092ndissue.pdf>.
264. "The Dispute over the Ownership of Egypt's Mobinil." *International Telecommunications Union Regulation Toolkit*.Dec. 22, 2011. International Telecommunications Union. Last accessed on July 27, 2011 at <http://www.ictregulationtoolkit.org/en/PracticeNote.3264.html>.
265. "NTRA Says Finding Local Partner in Mobinil Mandatory." Arab Finance Brokerage Company. Dec. 16, 2009. Last accessed Jan. 10, 2012 at <http://www.arabfinance.com/news/newsdetails.aspx?id=157214>.
266. Middle East Rating and Investors Service. "Egyptian Company for Mobile Services S.A.E (Mobinil)." Merisratings.com. November 2009. Last accessed Jan. 10, 2011 at <http://www.mobinil.com/investors/financialreports/doc/creditratingreportnov092ndissue.pdf>.
267. Etisalat. "Our History." Etisalat. Last accessed on June 27, 2012 at <http://etisalat.com/html/history.html> and "Etisalat Led Group Signs $2.88b Deal." *MENAFN*. Aug. 23, 2006. Last accessed on 4 Jan. 2011 at <https://www.menafn.com/qn_news_story_s.asp?storyid=1093124586>.
268. Etisalat. "About Us." Etisalat. Last accessed on June 27, 2012 at <http://etisalat.com.eg/etisalat/Etisalat_Portal_En/about/corporate.htm?_pageid=42,1&_dad=portal&_schema=PORTAL&siteAlias=etisalat&sitePath=Etisalat_Portal_En&kpAlias=about&pageAlias=corporat>.
269. Etisalat. "Our History." Etisalat. Last accessed on June 27, 2012 at <http://etisalat.com/html/history.html>.
270. Telecom Egypt. "Company Milestones." Telecom Egypt. Last accessed on June 27, 2012 at <http://ir.telecomegypt.com.eg/company%20 milestones.asp>.
271. Middle East Rating and Investors Service. "Egyptian Company for Mobile Services S.A.E (Mobinil)." Merisratings.-com. November 2009. Last accessed Jan. 10, 2011 at <http://www.mobinil.com/investors/financialreports/doc/-creditratingreportnov092ndissue.pdf>.
272. Ramadan, Amr. "Egypt to Sign Triple-play Licenses, Says Kamel at Euromoney." *Daily News Egypt*. Sept. 30, 2010. Last accessed on July 5, 2012 at <http://www.thefreelibrary.com/egypt+to+sign+triple-play+licenses,+says+kamel+at+euromoney.-a0238670369>.
273. Kotler, P and Armstrong, Gray, eds. "Pricing: Understanding and Capturing Customer Value." In *Principles of Marketing*. New York: Pearson Prentice Hall, 2012. Last accessed on June 27, 2012 at <http://catalogue.pearsoned.co.uk/assets/hip/gb/hip_gb_pearsonhighered/samplechapter/0273752502.pdf>.
274. Ministry of Communications and Information Technologies (MCIT) Dataset. Last accessed on July 5, 2012 at <http://www.mcit.gov.eg/indicators/ind_communications.aspx>.
275. Telecom Egypt. "Annual Reports 2006–2009." Telecom Egypt. Last accessed on May 14, 2012 at <http://ir.telecomegypt.com.eg/annual%20 reports.asp>.
276. Ministry of Communications and Information Technology (MCIT). "ICT Infrastructure and Access." Egypt ICT Indicators. Last accessed on Jan. 5, 2012 at <http://www.new.egyptictindicators.gov.eg/en/indicators/_layouts/keyindicatorsviewer.aspx>.
277. El Azhary, Emad. Personal interview. Nov. 24, 2011.
278. Ibid.
279. National Telecom Regulatory Authority (NTRA). "Mobile Number Portability Guidelines." National Telecom Regulatory Authority. 2008. Last accessed on Dec. 15, 2011 at <http://www.tra.gov.eg/presentations/numberpotabilityconsumersguide24032008_en.pdf>.
211. Rao, Madanmohan. Mobile Africa Report 2011: Regional Hubs of Excellence and Innovation. MobileMonday, 2011. Last accessed on Jan. 18, 2012 at <http://www.mobilemonday.net/reports/mobileafrica_2011.pdf>.
212. El Azhary, Emad. Personal interview. Nov. 24, 2011.
213. Egypt: The National Report on Literacy and Adult Education. United Nations Educational, Scientific and Cultural Organization, 2009. Last accessed on Dec. 19, 2011 at<www.unesco.org/fileadmin/multimedia/…/uil/…/egypt.pdf>.
214. Saleh, Nivien. Third World Citizens and the Information Technology Revolution. New York: Palgrave Macmillan, 2010.
215. Telecom Egypt. "Basic Information." Telecom Egypt. Last accessed Nov. 27, 2011 at <http://ir.telecomegypt.com.eg/basic information.asp#>.
216. Telecom Egypt. "Company Profile." Telecom Egypt. Last accessed on Nov. 27, 2011 at <http://ir.telecomegypt.com.eg/basic information.asp#>.
217. Ibid.

218. MCIT. Ministry of Communications and Information Technology eProtal. Last accessed on Nov. 29, 2011 at <http://www.mcit.gov.eg/telecommunications/historical_prespective>.
219. National Telecom Regulatory Authority (NTRA). "About Us." National Telecom Regulatory Authority (NTRA). Last accessed on June 27, 2012 at <http://www.tra.gov.eg/english/dpages_dpagesdetails.asp?id=180&menu=5>.
220. National Telecom Regulatory Authority (NTRA). "Media Convergence Issues in Egypt and the Region and Prospects for the Future." Scribd. 2009. Last accessed Nov. 27, 2011 at <www.scribd.com/doc/38482708/doc9-ntra>.
221. Telecom Egypt, "Annual Report 2009: Equipped For A New Era," Giza, 2009, 24. Last accessed on Nov. 27, 2011 at <http://ir.telecomegypt.com.eg/admin/uploads/annual-report-2009/final%20 annual%20web.pdf. 24>.
222. Telecom Egypt. "Wholesale." Telecom Egypt. 2008. Last accessed on Jan. 3, 2012 at <http://www.telecomegypt.com.eg/english/wholesale_mpls_ip-vpn.asp#>.
223. Telecom Egypt, "Annual Report 2009: Equipped For A New Era," Giza, 2009, 24. Last accessed on Nov. 27, 2011 at <http://ir.telecomegypt.com.eg/admin/uploads/annual-report-2009/final%20 annual%20 web.pdfp.24>.
224. Saleh, Nivien. *Third World Citizens and the Information Technology Revolution*. New York: Palgrave Macmillan, 2010. 147.
225. Saleh, Nivien. *Third World Citizens and the Information Technology Revolution*. New York: Palgrave Macmillan, 2010. 148–149.
226. K&M Engineering and Consulting Corporation. "ARENTO Cost of Service Study." USAID. National Telecommunications Organization & the U.S. Agency for International Development, 2011, 105. Last accessed on Dec. 19, 2011 at <http://pdf.usaid.gov/pdf_docs/pnabs218.pdf>.
227. Ibid.
228. El Azhary, Emad. Personal interview. Nov. 24, 2011.
229. Saleh, Nivien. *Third World Citizens and the Information Technology Revolution*. New York: Palgrave Macmillan, 2010.
230. Ibid.
231. Telecom Egypt. "Ownership Structure." Telecom Egypt. Last accessed on June 27, 2012 at <http://telecom.tedata.net/uipages/ownership_structure.aspx>.
232. Telecom Egypt. "Company Milestones." Telecom Egypt. Last accessed on June 27, 2012 at <http://ir.telecomegypt.com.eg/company%20 milestones.asp>.
233. Telecom Egypt. "Company Fact Sheet." Telecom Egypt. Last accessed on June 27, 2012 at <http://ir.telecomegypt.com.eg/company%20 fact%20 sheets.asp>.
234. "Subsidiaries and Investments." Telecom Egypt. Last accessed on June 27, 2012 at <http://ir.telecomegypt.com.eg/-subsidiaries.asp>.
235. El Azhary, Emad. Personal interview. Nov. 24, 2011.
236. Telecom Egypt. "Company Fact Sheet." Telecom Egypt. Last accessed on June 27, 2012 at <http://ir.telecomegypt.com.eg/company%20 fact%20 sheets.asp>.
237. Reuters. "Egypt to Auction 2nd Fixed-line License on June 19." Balancing Act Africa, no. 394. Last accessed on Jan. 4, 2012 at <http://www.balancingact-africa.com/news/en/issue-no-394/telecoms/egypt-to-auction-2nd/en>.
238. National Telecom Regulatory Authority (NRTA). "The NTRA Offering the Second Fixed-Line License." National Telecommunications Regulatory Authority. Last accessed on Dec. 19, 2011 at <http://www.tra.gov.eg/english/news_newsdetails.asp?pid=36&id=129>.
239. Middle East Rating and Investors Service. "Egyptian Company for Mobile Services S.A.E (Mobinil)." Merisratings.com. November 2009. Last accessed Jan. 10, 2011 at <http://www.mobinil.com/investors/financialreports/doc/creditrating-reportnov092ndissue.pdf>.
240. Ibid.
241. National Telecom Regulatory Authority (NRTA). "The NTRA Offering the Second Fixed-Line License." National Telecommunications Regulatory Authority. Last accessed on Dec. 19, 2011 at <http://www.tra.gov.eg/english/news_newsdetails.asp?pid=36&id=129>.
242. Ibid.
243. El Azhary, Emad. Personal interview. Nov. 24, 2011.
244. "Subsidiaries and Investments." Telecom Egypt. Last accessed on June 27, 2012 at <http://ir.telecomegypt.com.eg/-subsidiaries.asp>.
245. Hassanein, Leila. "Access to Infrastructure: Egypt." GISWatch. 2008. Last accessed Dec. 22, 2010 at <http://www.giswatch.org/sites/default/files/egypt_0.pdf>.
246. Saleh, Nivien. *Third World Citizens and the Information Technology Revolution*. New York: Palgrave Macmillan, 2010.
247. Al Bawaba. "Click to Become IPO in Egypt." Al Bawaba News. May 2, 2001. Last accessed on 18 Dec. 2011 at <http://www.albawaba.com/news/click-gsm-become-ipo-egypt>.
248. Hassanein, Leila. "Access to Infrastructure: Egypt." GISWatch. 2008. Last accessed Dec. 22, 2010 at <http://www.giswatch.org/sites/default/files/egypt_0.pdf>.
249. Kotler, P and Armstrong, Gray, eds. "Pricing: Understanding and Capturing Customer Value." In *Principles of Marketing*. New York: Pearson Prentice Hall, 2012. Last accessed on June 27, 2012 at <http://catalogue.pearsoned.co.uk/assets/hip/gb/hip_gb_pearsonhighered/samplechapter/0273752502.pdf>.
250. Ibid.
251. Etisalat. "Corporate Information." *Etisalat*. Last accessed June 27, 2012 at <http://etisalat.com.eg/etisalat/-etisalat_portal_en/about/corporate.htm?_pageid=42,1&_dad=portal&_schema=portal&sitealias=etisalat&sitepath=etisalat_portal_en&kpalias=about&pagealias=corporate>.
252. Kotler, P and Armstrong, Gray, eds. "Pricing: Understanding and Capturing Customer Value." In *Principles of Marketing*.

New York: Pearson Prentice Hall, 2012. Last accessed on June 27, 2012 at<http://catalogue.pearsoned.co.uk/assets/hip/gb/hip_gb_pearsonhighered/samplechapter/0273752502.pdf>.

253. Etisalat. "Corporate Information." *Etisalat*. Last accessed June 27, 2012 at <http://etisalat.com.eg/etisalat/etisalat_portal_en/about/corporate.htm?_pageid=42,1&_dad=portal&_schema=portal&sitealias=etisalat&sitepath=etisalat_portal_en&kpalias=about&pagealias=corporate>.

254. "Telecom Watchdog Decision Clears Way for 4th Egyptian Mobile Operator." Ahram Online. May 7, 2012. Last accessed on June 4, 2012 at <http://english.ahram.org.eg/newscontent/3/12/40995/business/economy/telecom-watchdog-decision-clears-way-for-th-egypti.aspx>.

255. "Telecom Watchdog Decision Clears Way for 4th Egyptian Mobile Operator." Ahram Online. May 7, 2012. Last accessed on June 4, 2012 at <http://english.ahram.org.eg/newscontent/3/12/40995/business/economy/telecom-watchdog-decision-clears-way-for-th-egypti.aspx>.

256. Ministry of Communications and Information Technology (MCIT). "ICT Infrastructure and Access." Egypt ICT Indicators. Last accessed on Jan. 5, 2012 at <http://www.new.egyptictindicators.gov.eg/en/indicators/_layouts/keyindicatorsviewer.aspx>.

257. Mobinil. "Annual Report 2010: Egyptian Company for Mobile Services (ECMS)." Mobinil. Last accessed on June 27, 2012 at <http://www.mobinil.com/investors/annualreport2010.aspx>.

258. Sahota, Dawinderpal. "France Telecom Increases Stake in Egypt's Mobinil." Telecoms.com, Feb. 13, 2012. Last accessed on July 27, 2012 at <http://www.telecoms.com/tag/mobinil/>.

259. "An Overly French Mobinil." Egypt Independent, no. 4, June 7, 2012, 11. Last accessed on June 27, 2012 at <http://www.scribd.com/doc/96300554/egypt-independent-jun-07>.

260. Orascom Telecom. "Our History." Orascom Telecom. Last accessed on June 27, 2012 at <http://www.orascomtelecom.com/about/contents/default.aspx?id=395>.

261. Mobinil. "Annual Report 2010: Egyptian Company for Mobile Services (ECMS)." Mobinil. Last accessed on June 27, 2012 at <http://www.mobinil.com/investors/annualreport2010.aspx>.

262. "The Dispute over the Ownership of Egypt's Mobinil." *International Telecommunications Union Regulation Toolkit*.Dec. 22, 2011. International Telecommunications Union. Last accessed on July 27, 2011 at <http://www.ictregulationtoolkit.org/en/PracticeNote.3264.html>.

263. Middle East Rating and Investors Service. "Egyptian Company for Mobile Services S.A.E (Mobinil)." Merisratings.com. November 2009. Last accessed Jan. 10, 2011 at <http://www.mobinil.com/investors/financialreports/doc/creditrating-reportnov092ndissue.pdf>.

264. "The Dispute over the Ownership of Egypt's Mobinil." *International Telecommunications Union Regulation Toolkit*.Dec. 22, 2011. International Telecommunications Union. Last accessed on July 27, 2011 at <http://www.ictregulationtoolkit.org/en/PracticeNote.3264.html>.

265. "NTRA Says Finding Local Partner in Mobinil Mandatory." Arab Finance Brokerage Company. Dec. 16, 2009. Last accessed Jan. 10, 2012 at <http://www.arabfinance.com/news/newsdetails.aspx?id=157214>.

266. Middle East Rating and Investors Service. "Egyptian Company for Mobile Services S.A.E (Mobinil)." Merisratings.com. November 2009. Last accessed Jan. 10, 2011 at <http://www.mobinil.com/investors/financialreports/doc/creditratingreportnov092ndissue.pdf>.

267. Etisalat. "Our History." Etisalat. Last accessed on June 27, 2012 at <http://etisalat.com/html/history.html> and "Etisalat Led Group Signs $2.88b Deal." *MENAFN*. Aug. 23, 2006. Last accessed on 4 Jan. 2011 at <https://www.menafn.com/qn_news_story_s.asp?storyid=1093124586>.

268. Etisalat. "About Us." Etisalat. Last accessed on June 27, 2012 at <http://etisalat.com.eg/etisalat/Etisalat_Portal_En/about/corporate.htm?_pageid=42,1&_dad=portal&_schema=PORTAL&siteAlias=etisalat&sitePath=Etisalat_Portal_En&kpAlias=about&pageAlias=corporat>.

269. Etisalat. "Our History." Etisalat. Last accessed on June 27, 2012 at <http://etisalat.com/html/history.html>.

270. Telecom Egypt. "Company Milestones." Telecom Egypt. Last accessed on June 27, 2012 at <http://ir.telecomegypt.com.eg/company%20 milestones.asp>.

271. Middle East Rating and Investors Service. "Egyptian Company for Mobile Services S.A.E (Mobinil)." Merisratings.-com. November 2009. Last accessed Jan. 10, 2011 at <http://www.mobinil.com/investors/financialreports/doc/-creditratingreportnov092ndissue.pdf>.

272. Ramadan, Amr. "Egypt to Sign Triple-play Licenses, Says Kamel at Euromoney." *Daily News Egypt*. Sept. 30, 2010. Last accessed on July 5, 2012 at <http://www.thefreelibrary.com/egypt+to+sign+triple-play+licenses,+says+kamel+at+euromoney.-a0238670369>.

273. Kotler, P and Armstrong, Gray, eds. "Pricing: Understanding and Capturing Customer Value." In *Principles of Marketing*. New York: Pearson Prentice Hall, 2012. Last accessed on June 27, 2012 at <http://catalogue.pearsoned.co.uk/assets/hip/gb/hip_gb_pearsonhighered/samplechapter/0273752502.pdf>.

274. Ministry of Communications and Information Technologies (MCIT) Dataset. Last accessed on July 5, 2012 at <http://www.mcit.gov.eg/indicators/ind_communications.aspx>.

275. Telecom Egypt. "Annual Reports 2006–2009." Telecom Egypt. Last accessed on May 14, 2012 at <http://ir.telecomegypt.com.eg/annual%20 reports.asp>.

276. Ministry of Communications and Information Technology (MCIT). "ICT Infrastructure and Access." Egypt ICT Indicators. Last accessed on Jan. 5, 2012 at <http://www.new.egyptictindicators.gov.eg/en/indicators/_layouts/keyindicatorsviewer.aspx>.

277. El Azhary, Emad. Personal interview. Nov. 24, 2011.
278. Ibid.
279. National Telecom Regulatory Authority (NTRA). “Mobile Number Portability Guidelines.” National Telecom Regulatory Authority. 2008. Last accessed on Dec. 15, 2011 at <http://www.tra.gov.eg/presentations/numberpotabilityconsumersguide24032008_en.pdf>.
280. Telecom Egypt. “Company Fact Sheet.” Telecom Egypt. Last accessed on June 27, 2012 at <http://ir.telecomegypt.com.eg/company%20 fact%20 sheets.asp>.
281. Mobinil. “Annual Report 2010: Egyptian Company for Mobile Services (ECMS).” Mobinil. Last accessed on June 27, 2012 at <http://www.mobinil.com/investors/annualreport2010.aspx>.
282. National Telecom Regulatory Authority (NTRA). “Broadband: The Speedy Access.” National Telecom Regulatory Authority. Last accessed on Dec. 15, 2011 at <http://www.tra.gov.eg/presentations/broadband_en.pdf>.
283. Monsef, Olfat A. “Pioneering Liberalization & Regulation of Telecommunications in The Arab Region.” *International Telecommunications Union*. November 2003. Last accessed on Mar. 12, 2012 at <www.ituarabic.org/previousevents/2003/reg/doc7.ppt>.
284. Abdel Hafez, Fatma H.M., and Wahba, Khaled (2004). “Assessment of the ‘Free Internet Access’ Project on the Internet Market in Egypt: System Dynamics View.” Presented at *Systems Dynamics Society Conference*. Oxford, England, July 25–29, 2004. Last accessed Jan. 5, 2011 at <http://www.systemdynamics.org/conferences/2004/sds_2004/papers/276wahba.pdf>.
285. Ministry of Communications and Information Technologies (MCIT). Dataset. Last accessed on July 5, 2012 at <http://www.mcit.gov.eg/indicators/ind_communications.aspx>.
286. El Azhary, Emad. Personal interview. Nov. 24, 2011.
287. MCIT. “Telecom Reform Milestones.” Ministry of Communication and Information Technology. Last accessed on Nov. 29, 2011 at <http://www.mcit.gov.eg/telecommunications/telecom_reform_milestones>.
288. Ibid.
289. Ibid.
290. Monsef, Olfat A. “Pioneering Liberalization & Regulation of Telecommunications in The Arab Region.” *International Telecommunications Union*. November 2003. Last accessed on Mar. 12, 2012 at www.ituarabic.org/PreviousEvents/2003/reg/Doc7.ppt. Abdel Hafez, Fatma H.M., and Wahba, Khaled (2004). “Assessment of the ‘Free Internet Access’ Project on the Internet Market in Egypt: System Dynamics View.” Presented at *Systems Dynamics Society Conference*. Oxford, England, July 25–29, 2004. Last accessed Jan. 5, 2011 at <http://www.systemdynamics.org/conferences/2004/sds_2004/papers/276wahba.pdf>.
291. Monsef, Olfat A. “Pioneering Liberalization & Regulation of Telecommunications in The Arab Region.” *International Telecommunications Union*. November 2003. Last accessed on Mar. 12, 2012 at www.ituarabic.org/PreviousEvents/2003/reg/Doc7.ppt. Abdel Hafez, Fatma H.M., and Wahba, Khaled (2004). “Assessment of the ‘Free Internet Access’ Project on the Internet Market in Egypt: System Dynamics View.” Presented at *Systems Dynamics Society Conference*. Oxford, England, July 25–29, 2004. Last accessed Jan. 5, 2011 at <http://www.systemdynamics.org/conferences/2004/sds_2004/papers/276wahba.pdf>.
292. National Telecom Regulatory Authority (NTRA). “Broadband: The Speedy Access.” National Telecom Regulatory Authority. Last accessed on Dec. 15, 2011 at <http://www.tra.gov.eg/presentations/broadband_en.pdf>.
293. Telecom Egypt, “Annual Report 2009: Equipped For A New Era,” Giza, 2009, 24. Last accessed on Nov. 27, 2011 at <http://ir.telecomegypt.com.eg/admin/uploads/annual-report-2009/final%20 annual%20 web.pdf>.58.
294. “Telecom Egypt Announces the Acquisition of Remaining TE Data Stake.” Telecom Egypt. Jan. 5, 2010. Last accessed on Mar. 12, 2012 at <http://ir.telecomegypt.com.eg/press%20 releases/press%20 releases/te%20 data%20 pr%20 -%20 final.pdf>.
295. Hot Telecom. Country profile: Egypt 2008. Apr. 30, 2008. Last accessed on Jan. 8, 2012 at <http://www.hottelecoms.com/egypt.pdf>.30.
296. “EtisalatMisr Acquires NOL and EgyNet.” Arab Finance. Oct. 27, 2008. Last accessed Jan. 8, 2012 at <https://www.-arabfinance.com/News/newsdetails.aspx?Id=122348>.
297. LinkdotNet. “News and Events.” LinkdotNet. Last accessed on June 27, 2012 at <http://www.link.net/english/-linkcorp/news+and+events/oth-logo.htm>.
298. LinkdotNet. “News and Events.” LinkdotNet. Last accessed on June 27, 2012 at <http://www.link.net/english/linkcorp/news+and+events/oth-logo.htm>.
299. YallaMisr. “About Us.” YallaMisr. Last accessed on June 27, 2012 at <http://www.yallamisr.com/about.htm> .
300. Africa Telecom. Information Gatekeepers Inc., 2:3, March 2001.
301. “Gamal Marwan Buys 100 Per Cent of MenaNet Communications SAE (MenaNet) from The African Lakes Corporation plc (ALC).” *AME Info*. May 24, 2004. Last accessed on Mar. 12, 2012 at <http://www.ameinfo.com/40072.html>.
302. National Telecom Regulatory Authority (NTRA). “Telecom Law.” National Telecom Regulatory Authority. Last accessed on June 4, 2012 at <http://www.tra.gov.eg/uploads/law/law_en.pdf>.
303. Fakharany, Wael. Email interview. Sept. 14, 2011.
304. Abou Hatab, Fathy. Personal interview. May 16, 2012.
305. Ibid.
306. Ibid.
280. Telecom Egypt. “Company Fact Sheet.” Telecom Egypt. Last accessed on June 27, 2012 at <http://ir.telecomegypt.com.eg/company%20 fact%20 sheets.asp>.
281. Mobinil. “Annual Report 2010: Egyptian Company for Mobile Services (ECMS).” Mobinil. Last accessed on June 27, 2012 at

<http://www.mobinil.com/investors/annualreport2010.aspx>.

282. National Telecom Regulatory Authority (NTRA). "Broadband: The Speedy Access." National Telecom Regulatory Authority. Last accessed on Dec. 15, 2011 at <http://www.tra.gov.eg/presentations/broadband_en.pdf>.
283. Monsef, Olfat A. "Pioneering Liberalization & Regulation of Telecommunications in The Arab Region." *International Telecommunications Union*. November 2003. Last accessed on Mar. 12, 2012 at <www.ituarabic.org/previousevents/2003/reg/doc7.ppt>.
284. Abdel Hafez, Fatma H.M., and Wahba, Khaled (2004). "Assessment of the 'Free Internet Access' Project on the Internet Market in Egypt: System Dynamics View." Presented at *Systems Dynamics Society Conference*. Oxford, England, July 25–29, 2004. Last accessed Jan. 5, 2011 at <http://www.systemdynamics.org/conferences/2004/sds_2004/papers/276wahba.pdf>.
285. Ministry of Communications and Information Technologies (MCIT). Dataset. Last accessed on July 5, 2012 at <http://www.mcit.gov.eg/indicators/ind_communications.aspx>.
286. El Azhary, Emad. Personal interview. Nov. 24, 2011.
287. MCIT. "Telecom Reform Milestones." Ministry of Communication and Information Technology. Last accessed on Nov. 29, 2011 at <http://www.mcit.gov.eg/telecommunications/telecom_reform_milestones>.
288. Ibid.
289. Ibid.
290. Monsef, Olfat A. "Pioneering Liberalization & Regulation of Telecommunications in The Arab Region." *International Telecommunications Union*. November 2003. Last accessed on Mar. 12, 2012 at www.ituarabic.org/PreviousEvents/2003/reg/Doc7.ppt. Abdel Hafez, Fatma H.M., and Wahba, Khaled (2004). "Assessment of the 'Free Internet Access' Project on the Internet Market in Egypt: System Dynamics View." Presented at *Systems Dynamics Society Conference*. Oxford, England, July 25–29, 2004. Last accessed Jan. 5, 2011 at <http://www.systemdynamics.org/conferences/2004/sds_2004/papers/276wahba.pdf>.
291. Monsef, Olfat A. "Pioneering Liberalization & Regulation of Telecommunications in The Arab Region." *International Telecommunications Union*. November 2003. Last accessed on Mar. 12, 2012 at www.ituarabic.org/PreviousEvents/2003/reg/Doc7.ppt. Abdel Hafez, Fatma H.M., and Wahba, Khaled (2004). "Assessment of the 'Free Internet Access' Project on the Internet Market in Egypt: System Dynamics View." Presented at *Systems Dynamics Society Conference*. Oxford, England, July 25–29, 2004. Last accessed Jan. 5, 2011 at <http://www.systemdynamics.org/conferences/2004/sds_2004/papers/276wahba.pdf>.
292. National Telecom Regulatory Authority (NTRA). "Broadband: The Speedy Access." National Telecom Regulatory Authority. Last accessed on Dec. 15, 2011 at <http://www.tra.gov.eg/presentations/broadband_en.pdf>.
293. Telecom Egypt, "Annual Report 2009: Equipped For A New Era," Giza, 2009, 24. Last accessed on Nov. 27, 2011 at <http://ir.telecomegypt.com.eg/admin/uploads/annual-report-2009/final%20 annual%20 web.pdf>.58.
294. "Telecom Egypt Announces the Acquisition of Remaining TE Data Stake." Telecom Egypt. Jan. 5, 2010. Last accessed on Mar. 12, 2012 at <http://ir.telecomegypt.com.eg/press%20 releases/press%20 releases/te%20 data%20 pr%20 -%20 final.pdf>.
295. Hot Telecom. Country profile: Egypt 2008. Apr. 30, 2008. Last accessed on Jan. 8, 2012 at <http://www.hottelecoms.com/egypt.pdf>.30.
296. "EtisalatMisr Acquires NOL and EgyNet." Arab Finance. Oct. 27, 2008. Last accessed Jan. 8, 2012 at <https://www.-arabfinance.com/News/newsdetails.aspx?Id=122348>.
297. LinkdotNet. "News and Events." LinkdotNet. Last accessed on June 27, 2012 at <http://www.link.net/english/-linkcorp/news+and+events/oth-logo.htm>.
298. LinkdotNet. "News and Events." LinkdotNet. Last accessed on June 27, 2012 at <http://www.link.net/english/linkcorp/news+and+events/oth-logo.htm>.
299. YallaMisr. "About Us." YallaMisr. Last accessed on June 27, 2012 at <http://www.yallamisr.com/about.htm> .
300. Africa Telecom. Information Gatekeepers Inc., 2:3, March 2001.
301. "Gamal Marwan Buys 100 Per Cent of MenaNet Communications SAE (MenaNet) from The African Lakes Corporation plc (ALC)." *AME Info*. May 24, 2004. Last accessed on Mar. 12, 2012 at <http://www.ameinfo.com/40072.html>.
302. National Telecom Regulatory Authority (NTRA). "Telecom Law." National Telecom Regulatory Authority. Last accessed on June 4, 2012 at <http://www.tra.gov.eg/uploads/law/law_en.pdf>.
303. Fakharany, Wael. Email interview. Sept. 14, 2011.
304. Abou Hatab, Fathy. Personal interview. May 16, 2012.
305. Ibid.
306. Ibid.
307. "Internet Filtering in Egypt." OpenNet Initiative. Aug. 6, 2009. Last accessed on Feb. 13, 2012 at http://opennet.net/sites/opennet.net/files/ONI_Egypt_2009.pdf.

307. "Internet Filtering in Egypt." OpenNet Initiative. Aug. 6, 2009. Last accessed on Feb. 13, 2012 at http://opennet.net/sites/opennet.net/files/ONI_Egypt_2009.pdf.