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FILM AND AUDIOVISUAL DATA COLLECTION PROJECT  
PROJECT TO COLLECT DATA ON FILM AND AUDIOVISUAL

## **PROJECT OF STATISTICAL DATA COLLECTION ON FILM AND AUDIOVISUAL MARKETS IN 9 MEDITERRANEAN COUNTRIES**

### **Country profile: 3. LEBANON**

**EUROMED AUDIOVISUAL III / CDSU in collaboration with the EUROPEAN AUDIOVISUAL  
OBSERVATORY**

**Dr. Sahar Ali, Media Expert, CDSU Euromed Audiovisual III  
Under the supervision of Dr. André Lange, Head of the Department for Information on Markets and  
Financing, European Audiovisual Observatory (Council of Europe)**

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## **Disclaimer**

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## NATIONAL AUDIOVISUAL LANDSCAPE IN NINE PARTNER COUNTRIES

### LEBANON

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## 1. BASIC DATA

### 1.1 Institutions

Lebanon - officially *Republic of Lebanon* – is a parliamentary republic, governed by the Constitution of 23<sup>rd</sup> May 1926, which was modified six times since<sup>1</sup>.

The Constitution guarantees freedom of conscience (article 9)<sup>2</sup> and freedom of expression (article 13)<sup>3</sup>. The most important change in the Constitution is the Taif Agreement<sup>4</sup> which reorganises the balance of power between the various religious communities.

Because of its multidenominational composition, Lebanon has a political system based on a distribution of power which is more or less proportional to the weight of each religious community. The Lebanese constitution officially recognizes eighteen religious communities. Thus, Lebanon mainly comprises three community groups: Druzes, Christians and Muslims.

Complex and original entity in the Middle East region, the Lebanese State is among the democracies that opted for a form of secularism, by the distinction it makes of the political and religious spheres. This distinction however does not have the same nature or the same perception as in other countries such as France, Germany, Italy, Switzerland or even in the United States of America. Unlike in France, secularization of politics in Lebanon allows a strong expression of all religious communities recognized by the law and their involvement in public affairs. Secular democracy is thus based on balance and community consensus, which has become its proper identity. *For a long time and still today, Lebanon is indeed characterized by the cohabitation between national legal and community legal orders, applying to citizens according to their religious affiliation*<sup>5</sup>. However, according to article G2 of the Taif Agreement, the indication of confession or rite on the identity card is banned.<sup>6</sup>

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<sup>1</sup> A French translation of the Constitution is available on the website of the Constitutional Council: <http://www.conseilconstitutionnelliban.com/sub-fr.aspx?id=169>

<sup>2</sup> Article 9: "freedom of conscience shall be absolute. In paying tribute to the Most High, the State shall respect all confessions and guarantees and protects their free exercise provided public order is not disturbed. It also guarantees that personal status and religious interests of the population, to whatever religious sect they belong, is respected." A N.B of the Constitutional Council adds "We believe that the translation could have been as follows: " ... the State respects all religions and confessions and guarantees under its protection the free exercise of religious rites provided ..."

<sup>3</sup> Article 13: "Freedom to express one's opinion orally or in writing, freedom of the press, freedom of assembly, and freedom of association shall be guaranteed within the limits established by Law."

<sup>4</sup> The 1989 Taif Agreement ended the civil war (1975-1990) and institutionalized a consensual system for the State governance by the communities comprising it. Thus, Supreme Magistrature, the Presidency of the Republic is filled by a Christian Maronite, the presidency of the Council of Ministers (<http://www.pcm.gov.lb/>) by a Sunni Muslim. The National Assembly (<http://www.lp.gov.lb/>) by someone from the Shiite community. <http://www.lesclesdumoyenorient.com/accord-de-Taef.html>

<sup>5</sup> Hiam Mouannès, " Liberté religieuse entre universalisme et communautarisme, le cas du Liban est-il à part? ", VIII French Congress of Constitutional Law Nancy, 16, 17 and 18 June 2011 <http://www.droitconstitutionnel.org/congresNancy/comN4/mouannesTD4.pdf>

<sup>6</sup> Taif Agreement 1989: [http://www.mpil.de/shared/data/pdf/taef\\_agreement\\_french.pdf](http://www.mpil.de/shared/data/pdf/taef_agreement_french.pdf)

## 1.2 Landmarks

Lebanon designates a whole east coast area of the Mediterranean. The land is surrounded on the north and east by Syria, on the south by Israel, with an area of 10,452Km<sup>2</sup>.

Lebanon draws on its strong assets of culture, geographical diversity, media and freedom of expression. It is important to highlight however that the image of Lebanon comes from the existence abroad of a strong Lebanese Diaspora (in number, at least twice the number of Lebanese citizens in Lebanon). It is very powerful, and occupies many leading industrial, political or banking positions in countries of Europe, America, francophone Africa or the Gulf.<sup>1</sup>

- Population: 3.759.137 according to estimates of the Central Administration of Statistics (CAS), 2008; 4.3 million in 2011 according to the *2011 State of World Population Report* of UNPFA<sup>2</sup>.
- The birth rate(CBR) is estimated at 15.02% (2011)
- The population growth rate 2.2% (2010-2015)
- According to estimates of the Central Intelligence Agency, GDP was at 57.3 billion USD in 2009 and 61.31 billion in 2010. In 2011, GDP is estimated at 62.23 billion USD<sup>3</sup>.
- Currency / Exchange rate: Lebanese Pound (LB)<sup>4</sup>, 100 EUR = 188.773 LB on 30<sup>th</sup> June 2012
- The official language of Lebanon is Arabic. French, first foreign language used, is both the language of culture and communication. 45 % of the Lebanese population is totally or partially francophone. The country also includes 30 % Anglophones<sup>5</sup>.

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<sup>1</sup> "The Lebanese Diaspora is often considered as one of the most important in the world in relation to the number of inhabitants of the country of origin. Although these figures vary, most reliable studies converge to state that there are as many, or even more, Lebanese citizens abroad than in Lebanon, i.e. about 3 to 4 million (Verdeil *et al*, 2007)". H. ASAL, " Dynamiques associatives de la diaspora libanaise: fragmentations internes et transnationalisme sur le Web ", *e-Diasporas*, Foundation *Maison des Sciences de l'Homme*, April 2012. <http://www.e-Diasporas.fr/working-papers/Asal-Lebanese-FR.pdf>; E. VERDEIL, G. FGAOUR and S. VELUT, *Atlas of Lebanon: Territories and Society*, 2007

<sup>2</sup> <http://foweb.unfpa.org/SWP2011/reports/FR-SWOP2011.pdf>

<sup>3</sup> <https://www.cia.gov/library/publications/the-world-factbook/geos/le.html>

<sup>4</sup> We use here the ISO code for the Lebanese Pound: LBP

<sup>5</sup> IPSOS Institute, study carried out by P. Monin: <http://www.le-Lebanon.com/>

### 1.3 Domestic Policy<sup>1</sup>

On 13<sup>th</sup> June 2011, Nagib Mikati announced a new government comprising 30 ministers.

- ▶ two thirds are from parties forming the pro-Syrian alliance of the 8<sup>th</sup> March (Free Patriotic Movement of General Aoun, Marada Christians of Sleimane Frangie, Armenian Tachnag, Hezbollah, Amal, PSNS notably);
- ▶ one third of ministers are supporters of the Prime Minister Nagib Mikati, of the Druze chief of PSP Walid Jumblatt and of ministers close to the President of the Republic Michel Sleimane.

The formation of the government, that the March 14 Movement led by Saad Hariri did not want to associate with, occurred in a context marked by the progress of the Syrian political and security crisis.

The new government publicly announced its ministerial statement on 7<sup>th</sup> July 2011. It sets objectives for improving the socio-economic situation, maintaining stability and unity of the country and respecting United Nations resolutions and international obligations for Lebanon notably regarding the special tribunal for Lebanon (with some ambiguity on this last point, as the statement introduces some reservations about the politicization of the Tribunal).

The Minister of Information is Mr. Walid Douak, Sunni, close to the Prime Minister. The Minister of Culture is Mr. Gaby Layoun, Greek Orthodox, from the Free Patriotic Movement. The Minister of Telecommunications is Mr. Nicoals Sehnaoui, Greek Catholic, also from the Free Patriotic Movement.

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<sup>1</sup> From "Presentation of Lebanon", Website of the French Ministry for Foreign Affairs, [http://www.diplomatie.gouv.fr/fr/pays-zones-geo/Lebanon/presentation-du-Lebanon/article/presentation-51896#sommaire\\_1](http://www.diplomatie.gouv.fr/fr/pays-zones-geo/Lebanon/presentation-du-Lebanon/article/presentation-51896#sommaire_1)

#### **1.4 Membership of Lebanon and its public audiovisual bodies in active international organizations of the audiovisual sector**

Lebanon is a member of the United Nations and various United Nations agencies which play a role in the audiovisual field, in particular UNESCO and WIPO (World Intellectual Property Organization), WTO. The country is also member of ITU (specialised institution of the United Nations for information technology and communication). It is also member of the Arab League and ALESCO and the Islamic Educational, Scientific and Cultural Organization (ISESCO) and the International Francophone Organization.

The National Audiovisual Council (CSA) is member of:

- REFARM: Francophone Network Media Regulators
- MNRA: Mediterranean Network of Regulatory Authorities

Public Lebanese Television, Télé-Liban, is a member of:

- ASBU: Arab States Broadcasting Union
- EBU - UER: European Broadcasting Union
- COPEAM: Permanent Conference of the Mediterranean Audiovisual Operators
- The International Council of French-Speaking Radio and Television
- OIF: International Organization of la Francophonie (Francophone fund for south audiovisual production).

The Telecommunication Regulatory Authority (TRA) is a member of:

- AREGNET: Arab Regulators Network for Telecommunications & Information Technologies



## 1.5 Links with European institutions

### 1.5.1 The European Union<sup>1</sup>

The European Union (EU) strives to help Lebanon become a stable and democratic society, with an open political life and a strong economy.

Bilateral relations are based on the [EU-Lebanon Association Agreement](#), which establishes a framework for political dialogue, reinforcement of commercial exchange and promotion of economic and political cooperation. The [EU-Lebanon action plan](#) translates these objectives into detailed action.

A second EU-Lebanon action plan is under preparation; it shall implement the principles of the [new European Neighbourhood Policy Instrument](#), which has been reviewed following the 2011 Arab spring. Progress achieved in completion of objectives of the action plan is subject to an annual assessment published in follow-up reports of the European Neighbourhood Policy.

#### *Financial assistance*

Lebanon benefits from [EU financial assistance](#) with an annual amount of about 50 million EUR, granted under the [European Neighbourhood and Partnership Instrument](#) (ENPI). This amount is complemented by various [regional](#) and [thematic programmes](#).

On the regional level, the Barcelona Conference gathered in November 1995 15 European Union countries and 12 Mediterranean partner countries, which resulted in the [Barcelona Declaration](#), an ambitious programme for dialogue, exchange and cooperation in order to ensure peace, stability and prosperity in the region. This unprecedented political commitment covers the "Policy and Security", "Economic and Financial" and "Social, cultural and human" aspects. This partnership is established at the bilateral level through an [association agreement](#) with each Mediterranean partner and the European Union. The main objectives of the Association Agreement are:

- To reinforce political dialogue,
- To set necessary conditions for the progressive liberalization of exchange of goods, services and capital,
- To develop balanced economic and social relations between parties
- To support South-South integration initiatives
- To promote cooperation in the economic, social, cultural and financial fields.

Lebanon, which occupies a strategic place in the Euro-Mediterranean partnership, signed an Association agreement in July 2002, establishing an association between the European Community and its Member States, on the one hand, and the Republic of Lebanon, on the other hand<sup>2</sup>. Article 53 of the Agreement covers the promotion of cooperation to develop the information and telecommunications society. As for article 67, it agrees to promote Cooperation in the fields of culture, audiovisual media and information. While establishing a sustainable dialogue in the cultural field in a spirit for mutual respect of cultures, this cooperation aims at:

- The conservation and restoration of the historical and cultural heritage (monuments, sites, objects, rare books and manuscripts, etc.);

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<sup>1</sup> From the page "European Union – External Action", consulted on 16<sup>th</sup> November 2012, [http://eeas.europa.eu/lebanon/index\\_fr.htm](http://eeas.europa.eu/lebanon/index_fr.htm)

<sup>2</sup> Euro-Mediterranean Agreement establishing an association between the European Community and its Member States, on the one hand, and the Republic of Lebanon, on the other hand. Official Journal of the European Union, 30 May 2006. [http://eeas.europa.eu/lebanon/Aocs/euro\\_mediterranean\\_agreement\\_fr.pdf](http://eeas.europa.eu/lebanon/Aocs/euro_mediterranean_agreement_fr.pdf)

- The exchange of exhibits and artists;
- The training of people working the field of culture

Compliance with the principles of democracy and human rights is also an essential element of the Association Agreements.

*The Neighbourhood Policy: a new framework for the future*

In 2003, the European Union launches [the Neighbourhood Policy](#) which completes, specifies and reinforces the euro-Mediterranean partnership.

Through the European Neighbourhood Policy, the EU attempts to avoid the creation of new division lines between the enlarged EU and its neighbours on the East and on the Southern and Eastern coasts of the Mediterranean. The ENP goes beyond existing relations to offer more advanced political relations and an economic integration, reinforcing stability, security and general wellbeing.

This relation is based on a mutual commitment to promote common values, such as:

- compliance with the rules of law,
- good governance,
- respect for human rights,
- promotion of good neighbourly relations,
- market economy
- sustainable development.

These ideas are materialised in differentiated [Action Plans](#) established, by mutual agreement, by the EU and each partner country and take into account the specificities of each one. These Action Plans define an economic and political reform programme with short-term and mid-term priorities.

Drafted within the framework of the European Neighbourhood and Partnership Instrument (ENPI), the Country Strategy Paper, CSP<sup>1</sup>, provides a framework where EC support shall be made available to Lebanon during the 2007-2013 period. It formulates cooperation objectives, political response and priority cooperation areas of the EU based on an in-depth assessment of the political agenda of the country and its political and socio-political situation<sup>2</sup>.

In terms of audiovisual cooperation with the European Union, Lebanon has been a partner for the first two Euromed Audiovisual Programmes and is currently partner in Euromed Audiovisual III Programme (2011-2013)<sup>3</sup>.

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<sup>1</sup> European Neighbourhood and Partnership Instrument- Republic of Lebanon, Country Strategy Papers 2007-2013 and National Indicative Programme 2007-2010, EU.

[http://ec.europa.eu/world/enp/pdf/country/enpi\\_csp\\_nip\\_lebanon\\_fr.pdf](http://ec.europa.eu/world/enp/pdf/country/enpi_csp_nip_lebanon_fr.pdf)

<sup>2</sup> For more information on the development of the Neighbourhood Policy with Lebanon, see "Implementation of the European Neighbourhood Policy in Lebanon Progress in 2011 and recommendations for action", Joint Staff Working Document, *Accompanying the document* Joint Communication to the European Parliament, the Council, the European Economic and Social Committee and the Committee of the Regions, European Commission, Brussels, 15.05.2012

[http://ec.europa.eu/world/enp/docs/2012\\_enp\\_pack/progress\\_report\\_lebanon\\_en.pdf](http://ec.europa.eu/world/enp/docs/2012_enp_pack/progress_report_lebanon_en.pdf)

<sup>3</sup> Euromed Audiovisual Program III (2011-2013), <http://www.euromediaudiovisual.net/p.aspx?t=general&mid=85&l=fr>

Lebanon attended the Euro-Mediterranean Ministerial Conference for Culture which took place in May 2008 in Athens and confirmed the "Strategy for the Development of Euro-Mediterranean Audiovisual Cooperation"<sup>1</sup> developed within the framework of Euromed Audiovisual Programme II and is currently partner in Euromed Audiovisual Programme III (2011-2013).

### *Access to the MEDIA MUNDUS*

The MEDIA MUNDUS Programme of the European Union was adopted by RULING1041/2009/EC OF THE EUROPEAN PARLIAMENT AND THE COUNCIL dated 21 October 2009 establishing an audiovisual cooperation programme with third country professionals (MEDIA Mundus)<sup>2</sup>. With a budget for 15 million Euros for a three-year period (2011 – 2013), this new programme aims at reinforcing cultural cooperation and trade relations between the European and third country film industries. It follows [MEDIA International Preparatory Programme](#). Its implementation corresponds to a strong demand from the different actors of the audiovisual sector to facilitate and reinforce cooperation between European countries and third countries.

MEDIA MUNDUS supports projects in the following fields:

- Training: to strengthen competencies of European and third country professionals.
- Market access: to contribute to the funding of projects aimed at promoting access of audiovisual works to international markets. These projects relate to development and/or preproduction stages (for example international co-production markets) and downstream activities (including events to facilitate the international sale of works).
- Support to distribution and circulation: to promote distribution, advertising, screening and circulation of European works in third country markets in optimal conditions, as well as third country audiovisual works in Europe.
- Cross activities: to contribute to financing cross projects<sup>3</sup> in several priority activities of the programme; for example training followed by promotional events during co-production meetings.

In order to be funded under MEDIA Mundus, projects must be proposed and implemented jointly by European professionals and third country professionals and must promote the creation of networks internationally.

### *The future Creative Europe Programme*

On 25th November 2011 the European Commission adopted its proposal for a Regulation of the European Parliament and the Council with the Creative Europe Programme.<sup>4</sup> The proposal was the subject of a preliminary "global approach" adopted by the Ministers' Council on 10<sup>th</sup> May 2012. It is being examined at the European Parliament<sup>5</sup>.

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<sup>1</sup> <http://www.euromediaaudiovisual.net/general.aspx?treeID=9243&lang=fr&documentID=9244>

<sup>2</sup> <http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=OJ:L:2009:288:0010:0017:FR:PDF>

<sup>3</sup> <http://register.consilium.europa.eu/pdf/en/12/st09/st09097.en12.pdf>

<sup>4</sup> [http://ec.europa.eu/culture/creative-europe/documents/proposal-regulation\\_fr.pdf](http://ec.europa.eu/culture/creative-europe/documents/proposal-regulation_fr.pdf)

<sup>5</sup> <http://www.europarl.europa.eu/committees/en/opinions.html?urefProcYear=2011&ufolderId=&ufolderComCode=&linkedDocument=true&ufolderLegId=&urefProcNum=0370&urefProcCode=COD> ;

Article 16 of the Commission's proposal provides for the accessibility to future country programme under the European Neighbourhood Policy (which includes Lebanon), according to the arrangements defined with these countries in the framework agreements providing for their participation in programmes of the Union. This participation would be subject to meeting the requirements, including, for MEDIA, those established by directive 2010/13/EU of the European Parliament and the Council of 10<sup>th</sup> March 2010 aiming at coordinating a few legal, statutory and administrative provisions of Member States on service delivery of audiovisual media, and to paying additional appropriations.

### *1.5.2 The Council of Europe*

There are no statutory relations between Lebanon and the Council of Europe. Lebanon is part of the countries included in the Neighbourhood Policy of the Council of Europe put in place in 2011.

Relations established between the Council of Europe and Lebanon so far do not include the media or audiovisual sector.<sup>1</sup>

As a service provider, The European Audiovisual Observatory, Enlarged Partial Agreement of the Council of Europe, is involved in the present data collection project of Euromed Audiovisual III Programme of the European Union.

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<sup>1</sup> Progress report on the implementation of the Council of Europe policy towards its immediate neighbourhood, Council of Europe, September 2011, [https://wcd.coe.int/ViewDoc.jsp?Ref=SG/Inf\(2011\)20&Language=lanEnglish&Ver=original&Site=DC&BackColorInternet=DBDCF2&BackColorIntranet=FDC864&BackColorLogged=FDC864](https://wcd.coe.int/ViewDoc.jsp?Ref=SG/Inf(2011)20&Language=lanEnglish&Ver=original&Site=DC&BackColorInternet=DBDCF2&BackColorIntranet=FDC864&BackColorLogged=FDC864)

## 2. THE DEVELOPMENT OF TELECOMMUNICATION INFRASTRUCTURES



### 2.1 Telecommunication Regulatory Authority (TRA)

Created in 2002, the Telecommunication Regulatory Authority (TRA) is the entity in charge of regulating the telecommunication market in Lebanon. The mission of TRA is to establish a regulatory framework likely to found a competitive telecommunications market in the country and to ensure the various services at affordable prices for a wide range of the Lebanese population.

Placed within the cabinet of the State Minister for administrative reform (OMSAR), the technical cooperation unit (TCU) is in charge of laying down the technical specifications and of assessing ICT projects. In addition, it offers advisory services to Lebanese public administrations and carries out technical studies<sup>1</sup>.

### 2.2 An investment policy

*The international capacity of Lebanon*

*The Progress Report June 2011- June 2012*<sup>2</sup>, indicates that several investments have been carried out at the initiative of Lebanese ministers of telecommunications Gebran Bassil, Charbel Nahas (2009-2011) and Nicolas Sehnaoui (starting 2011), to increase international and local capacity to improve the connectivity of the country.

The international capacity of Lebanon was at 2 Gbps when Gebran Bassil assumed the position. Under his mandate (2008-2009), the State has invested 51 million dollars in the IMEWE consortium (India - Middle East - Western Europe) to build a cable linking India to Europe through Lebanon; which could provide at the end 120 Gbps capacity. The Ministers Nahas and Sehnaoui have completed necessary investments to upgrade this cable which will offer upon completion a 200 Gbps capacity. Also, the Ministry is currently negotiating the purchase of a capacity which could reach, following need, 800 Gbps through the Cypriote Alexandros cable, in order to ensure a redundancy to international traffic from Lebanon.

The Progress Report June 2011- June 2012 indicates that in 2011, the telecom market brought 1.4 billion dollars in net income to the State.

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<sup>1</sup> See <http://www.tra.gov.lb/>

<sup>2</sup> *Progress Report June 2011- June 2012*, Ministry of Telecom, Beirut, [http://www.mpt.gov.lb/mpt/images/stories/MOT\\_brochure\\_fr%5B1%5D.pdf](http://www.mpt.gov.lb/mpt/images/stories/MOT_brochure_fr%5B1%5D.pdf)

### 2.3 Telecommunications market data

The market for digital media is regulated by the Ministry of information. The following table presents the bodies in charge of the five relevant areas identified in the framework of regional initiatives for the region of Arab States, adopted by the CMDT-10, held by ITU.

	National entity responsible
Broadband network access	TRA
Digital broadcasting	Ministry of Information
Open-source software	N/A
Arabic digital content	N/A
Cybersecurity	N/A

Source: Arab Advisors Group<sup>1</sup>

#### ***Fixed telephone market***

OGERO is the only fixed telephone operator in Lebanon. Because of high prices for international call services, VoIP services are, in some cases, offered illegally in this country. Moreover, due to the obsolescence of the fixed network, intelligent network services, such as Fixed line text messages, free calls, or collect calls are not provided<sup>2</sup>.

In April 2012, there are 855,000 subscriptions to fixed telephony, i.e. a penetration rate of 20%.

#### **Fixed telephone subscriptions in Lebanon, 2012**

	2012
Fixed-telephone subscriptions (thousands)	855
Fixed-telephone penetration rate	20%

Source: Telecommunication Regulatory Authority (TRA), Beirut, October 2012.

<sup>1</sup> Mentioned in *ICT adoption and perspectives in the region of Arab States 2012*, ITU, Geneva; [http://www.itu.int/dms\\_pub/itu-d/opb/ind/D-IND-AR-2012-PDF-F.pdf](http://www.itu.int/dms_pub/itu-d/opb/ind/D-IND-AR-2012-PDF-F.pdf)

<sup>2</sup> Ibid.

	Oct.-11	May -12	
Number of DSL subscribers			
Lawful	200.000	240.000	20%
Unlawful	150.000	150.000	–
Theoretical speed	128 KBSP	1 MBSP	x8
Actual speed	40 KBSP	600 KBSP	x15
MBSP price	77 dollars	16 dollars	-80%
Private DSL data	2.3 GB	6.7 GB	x3

Source: Progress Report, June 2011- June 2012 - Ministry of Telecom

### ***Mobile cellular telephone market***

The Lebanese mobile cellular telephone market is a duopoly controlled by the government. Both cellular networks in Lebanon are operated based on management contracts agreed between the government and regional operators Orascom Telecom and Zain Group. Orascom Telecom operates Alfa and Zain Group MTC Touch.

Some 189,200 additional subscriptions have been concluded by Alfa and MTC Touch during the first six months of the year 2011, thus reaching a total of 3.1 million. This growth resulted, in June of the same year, in a penetration rate of mobile cellular telephone at 72.2%.

The mobile telephone subscription rate shows, at the end of the second quarter 2012, a total of 3.6 million, i.e. 85.4% of the population owns a mobile phone in use – which puts Lebanon above the average for developing countries which is at 78.8%<sup>1</sup>.

The following table, which data was provided by the Telecommunication Regulatory Authority (TRA), notes several indicators of the telecommunications market starting from the first quarter 2010 until the second quarter 2012.

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<sup>1</sup> Progress Report June 2011- June 2012, op.cit

Film and audiovisual data collection project

Indicator	Q1 2010	Q2 2010	Q3 2010	Q4 2010	Q1 2011	Q2 2011	Q3 2011	Q4 2011	Q1 2012	Q2 2012
<b>Subscriptions mobile telephone (In millions)</b>	2.451	2.585	2.789	2.864	2.985	3.121	3.299	3.438	3.470	3.638
<b>MIC (Alfa) and MIC 2 (Touch) Distribution</b>	46% 54%	45% 55%	46% 54%	47% 53%	46% 54%	46% 54%	46% 54%	48% 52%	48% 52%	48% 52%
<b>Prepaid Subscriptions in (%)</b>	0.82	0.82	0.83	0.83	0.84	0.84	0.85	85%	0.85	0.85
<b>Mobile Broadband users (3G)</b>	The service (3G) was launched in October 2011							472,000	579,000	780,000
<b>Broadband subscriptions (FWB and ADSL)</b>	220,000*	223,000*	231,000*	233,000	n.a	n.a	n.a	240,000	275,000	n.a
<b>Land line subscriptions</b>	n.a	n.a	824,000	850,000	n.a	n.a	n.a	850,000	855,000	855,000

\* Approximate figures

Source: Telecommunication Regulatory Authority (TRA), Beirut, October 2012.



### **Internet broadband market**

*ICT adoption and perspectives in the region of Arab States 2012*<sup>1</sup> highlights that Internet services are provided by the public fixed operator OGERO under the control of the Ministry of telecommunications (MOT). At the end of the 2010, 16 accredited ISP offered Internet and wireless broadband services on local radio networks of four data service providers (DSP), and offered solutions applicable to individuals and businesses. ADSL services are provided by ISPs who access the local loop through bit stream services offered by the MOT or by the four DSPs. As for DSPs, they access the ministry's local loop through sharing of lines or unbundling<sup>2</sup>.

In November 2011, MTC Touch launched its 3G services in the country by upgrading 420 sites out of 850. The areas covered include Beirut, Saidon, Zahle and several other communities in the Larger Beirut area. MTC Touch intends to extend its 3G services to the whole country by 2012<sup>3</sup>. The second mobile operator, Alfa, has, for their part, started providing 3G services in October 2011<sup>4</sup>.

### **Broadband network access**

As indicated in the ITU report, in February 2010, Lebanon had nine data service providers (DSP). TRA allocated frequencies to seven of these nine DSPs so that they can provide broadband wireless access services (BWA). However, only four accredited operators Cable One, Cedarcom, GlobalCom Data Services (GDS) and Pesco have operational infrastructures and offer wireless Internet access to households and their corporate clients.

Among the recent broadband network projects in the country is the implementation of mobile broadband technology and that of a new ADSL and international bandwidth capacity. Alfa and MTC Touch have deployed the mobile broadband technology in accordance with 3G GSM standards.

As for expected broadband technology, MTC Touch intends to equip in the future 50 sites with LTE 4G technology, thus offering a 173 Mo/second rate. During the third quarter of 2010, the Ministry of telecommunications launched a project to put in place a new optical-fibre platform which will be the main infrastructure for digital transport of telecommunication services. This project, which was planned to run over 18 months, includes installing at least 300 optical-fibre connexions to ISPs, educational institutions and government bodies. Strictly speaking, this is not yet FTTH deployment but the beginning of an extension of fibre optic connectivity of the last kilometre<sup>5</sup>.

### **Digital broadcasting**

The Ministry of Information is currently the body in charge of regulating the digital broadcasting market in Lebanon. In October 2012, there are 24 private providers and one public provider for

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<sup>1</sup> Ibid, p. 87

<sup>2</sup> See <http://www.tra.gov.lb>.

<sup>3</sup> See <http://www.touch.com.lb/autoforms/portal/touch>

<sup>4</sup> See <http://www.alfa.com.lb>.

<sup>5</sup> See <http://www.tra.gov.lb>

satellite services (See *public and private satellite television section*). The following table provides additional specifications regarding digital broadcasting technologies in Lebanon.

- Digital broadcasting technologies in Lebanon, November 2012.

Digital broadcasting technology	Market status	Service providers	Regulatory entity responsible for service
Digital terrestrial	Not operational	N/A	Ministry of Information
DTH Satellite	Operational	1 state-owned and 25 privately-owned channels*	Ministry of Information
IPTV	Operational	Sofrecom in partnership with Orange Business Services	TRA
Mobile TV (IP- based)	Not operational	N/A	TRA
Mobile TV (DVB)	Not operational	N/A	Ministry of Telecommunications

\* DTH satellite service providers refer to channels and not broadcasters or operators, i.e. more than one channel can be operated by one broadcaster/operator. Data include free-to-air channels and correspond to the inventory of Lebanese satellite channels we carried out in November 2012.

Source: *ICT adoption and perspectives in the region of Arab States 2012*, TRA, National Ministries, Euromed Audiovisual III.

In Lebanon, television services are provided according to the following arrangements<sup>1</sup>:

- Free analogue TV on ultra high frequency (UHF)
- Multipoint video distribution system (MVDS) on the 10-12 GHz band
- Non accredited television wireless and cable distribution
- Direct to home broadcasting (DTH)

According to the director of the Telecommunications technologies unit (Telecommunication Regulatory Authority), most household television receivers are analogue, while the main digital television services are broadcast by operators through satellites or DVB-MS147 technology. All broadcasters whose transmissions are carried terrestrially on ultra high frequency use analogue transmitting networks including several transmitting sites<sup>2</sup>.

In partnership with Orange Business Services, Sofrecom carried out an operational IPTV deployment for the "Solidere" area, in downtown Beirut, in May 2008. On the other hand, mobile television is not operational on the Lebanese market.

<sup>1</sup> *Switching from analogue to digital television: The big picture in the Arab region*, ITU News, N° 2 2012, <https://itunews.itu.int/En/2346-Switching-from-analogue-to-digital-television.note.aspx>

<sup>2</sup> Interview with the director of the Telecommunications technologies unit (Telecommunication Regulatory Authority) Mr. Imad Hobballah, Beirut, October 2012.

### 3. THE REGULATORY FRAMEWORK FOR TELEVISION

#### 3.1 The Ministry of Information<sup>1</sup>

The Ministry of Information is indeed the entity in charge of monitoring media programmes and sanctioning radio and television operators which violate the law.

In 1996, the National Audiovisual Council (NAC) was founded and meant to be the body for media regulation in the country. But it has very little power. The Minister of information and the Council of Ministers have more substantial powers.

#### ***Before the 1994 Law***

Until 1977, there were only two television channels in the country. These are private companies and part of their operations was within the hands of British and French investors. In other words, there is no public television channel or channel owned by the State in Lebanon. Starting from 1995, the State took possession of Télé-Liban (TL) pursuant to Law No.382 of 1994<sup>2</sup> on the liberalization of the sector.

#### 3.2 Law No. 382-1994 on Radio and Television Broadcasting

Though private broadcasting goes back to 1959, there was no law to regulate the private sector until 1994, when Law No. 382 for radio and television broadcasting was voted. This law ended State monopoly on frequencies and regulated the operating of all private channels. Article 3 states that "the audiovisual sector is free. Media freedom is exercised within the framework of the constitution and laws in force." The law institutes a terrestrial broadcasting licensing system. Licences are granted by the Minister of information, following opinion of a technical Committee and of the National Audiovisual Council. The granting of licences is governed by the provisions of articles 233, 234, 235 and 250 of legislative decree No. 126 of 16<sup>th</sup> February 1959.

The request for lease of a channel is submitted in 3 copies to the Ministry of Post and Telecommunication which requests the opinion of the Minister of information in this respect within a period of not more than 15 days.

Televisions are classified in four categories:

- 1- 1<sup>st</sup> category: televisions which air television programmes, including News and political programmes, and which broadcasting covers the whole Lebanese territory.
- 2- 2<sup>nd</sup> category: televisions which air television programmes, except for News and political programmes, and which broadcasting covers the whole Lebanese territory.
- 3- 3<sup>rd</sup> category: digital television channels which programmes can only be viewed by subscribers who own technical equipment for this.
- 4- 4<sup>th</sup> category: international television channels which broadcasting is based on satellite and goes beyond the limits of the Lebanese territory.

Within the limits of granted broadcasting capacity, television channels may have, apart from their general programme, a broadcasting dedicated to a particular area of the Lebanese

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<sup>1</sup> <http://www.ministryinfo.gov.lb/main/main.aspx> (in Arabic) and <http://www.ministryinfo.gov.lb/en/main/main.aspx> (in English)

<sup>2</sup> Law n° 382 for Radio and Television Broadcasting, text available at: <http://www.ministryinfo.gov.lb/fr/main/MediaLaws/ActNo.382.aspx>

territory to cover questions related to this area, provided airing time does not exceed 20 hours per week.

Private broadcasters must take into account several requirements related to the content broadcasted which corresponded for the most part to the PBS mission concept (public broadcasting service). For example, all licence operators must ensure universal access (i.e. cover the whole national Lebanese territory), must promote national production and respect diversity of opinion and pluralism.

Books of specifications related to each type of licence are fixed by decree<sup>1</sup>. They include quotas for different types of programmes and force licensed operators to broadcast a specific number of hours for news, drama, children's programmes, documentaries, etc. General requirements in terms of content according to Law 382/94 also apply to the national public channel, though books of specifications with quotas related to different types of programmes do not concern private operators. This means in fact, that private television operators are theoretically and legally subject to stricter content requirements than Télé-Liban which continues to operate in a vacuum until a decree regulates the content of its programmes<sup>2</sup>.

### 3.3 Law of 1996 on satellite broadcasting

A law on satellite broadcasting was adopted in 1996<sup>3</sup>. According to this law, "Pursuant to a decree adopted at the Council of Ministers following proposal of the Ministers for Post and Telecommunications, it is possible to lease channels for the transmission and reception of image and sound simultaneously through satellites and ground stations under the authority of the Ministry and in accordance with conditions defined in this law".

As a consequence, dozens of radio stations and several private television channels obtained operating licences in 1996, and most are still in service today.

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<sup>1</sup> Decree No. 7997 (1996), Ratification of standard books of specifications for television and radio institutions of the 1<sup>st</sup> and 2<sup>nd</sup> categories,

<http://www.ministryinfo.gov.lb/en/main/LicensingFoundation/Bookofconditionstypicalofthenewsmediaand.aspx>;

Standard book of specifications for television institutions of the 2<sup>nd</sup> category,

<http://www.ministryinfo.gov.lb/en/main/LicensingFoundation/Bookofconditionstypicalofthenewsmedia2ndcateg.aspx>

<sup>2</sup> Olga Del Rio Sanchez, *La mission de service public audiovisuel dans la région Maghreb/Machrek*, Panos Institute Paris, and Mediterranean Observatory for Communication, May 2012;

[http://www.academia.edu/2134048/LA\\_MISSION\\_DE\\_SERVICE\\_PUBLIC\\_AUDIOVISUEL\\_DANS\\_LA\\_REGION\\_MAGHREB\\_MASHREK](http://www.academia.edu/2134048/LA_MISSION_DE_SERVICE_PUBLIC_AUDIOVISUEL_DANS_LA_REGION_MAGHREB_MASHREK)

<sup>3</sup> Law No.531 for satellite broadcasting,

<http://www.ministryinfo.gov.lb/en/main/MediaLaws/Satellitebroadcastinglaws.aspx>

### 3.4 National Audiovisual Council (NAC)<sup>1</sup>

#### **Organization and missions**

The National Audiovisual Council is a regulating mechanism. It was established in 1996, in accordance with article 19 of Law No. 382/1994. The task of the Council is to examine licence applications for private radio stations and private television operators and provide an advisory opinion to the Council of Ministers for approval or rejection of the application. This opinion is published in the Official Journal when the Minister of information submits the application to the Council of Ministers (article 19). In other words, the NAC does not have the power to grant. This is a consultative body under the Council of Ministers which is only body with the authority to grant licences (article 16), and which may accept or reject NAC recommendations.

NAC comprises 10 members. Half of these members are appointed by the government and the other half by Parliament. The budget is voted by Parliament and is included in that of the Ministry of Information. NAC does not prepare its budget. Its main office is within the premises of the Ministry of Information.<sup>2</sup>

Upon request from the Ministry of Information and through its bodies, NAC may exercise control over televisions and radios (article 47). The Council provides an opinion about the books of specifications (which are drafted by an ad hoc committee appointed by the Council of Ministers, article 25). In case of violation of the law by broadcasters, NAC recommends sanctions (article 25).

It is worth noting that NAC does not have a mandate to receive claims from the public. In case of a violation of the law, the Minister of information may "following proposal of NAC" prevent the media institution to broadcast for a maximum three-day period (article 35). In case of a second violation, the Council of Ministers, based on a recommendation from the Minister of information and NAC, prevents the company to broadcast for a period varying between three days minimum and one month maximum.

#### **Relations with the government**

In other terms, it is the Council of Ministers and to a lesser degree, the Minister of information, who has the decision-making power to grant licences or impose sanctions. The recommendations of NAC are not always taken into consideration. In 1996, when private television channels and radio stations first received licences, the government ignored a recommendation from NAC to reject an application<sup>3</sup>.

Another indicative incident occurred more recently in 2006, when NAC criticised the programmes of some operators under licence, accusing them of violating Law 382 of 1994 and the Penal Code, but the Minister of information did not agree. He rejected the recommendations of NAC and did not order sanctions against the LBC channel arguing the right of freedom of expression in Lebanon<sup>4</sup>.

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<sup>1</sup> NAC does not publish a Website. It is thus not possible to indicate the statements or texts first hand.

<sup>2</sup> R. de LA BROSSE, *La régulation des médias audiovisuels dans l'espace francophone: Bilans et perspectives*. Study commissioned by IOF, IOF, Paris, s.d. (2009)

<sup>3</sup> Ibid, p.92

<sup>4</sup> The satirical programme *Bas mat watan* broadcast on the Lebanese channel LBC parodied the Hezbollah leader Hassan Nasrallah by dedicating one of its episodes to criticizing the party vilifying the firing of Katyusha rockets, the pseudo "balance of dissuasion" with Israel preached by Hezbollah. The episode irritated the Shiite community who protested against the ridiculing of its leader. TNAC firmly condemned the episode and wanted to impose sanctions against the channel, but the Minister of information opposed this and supported the channel.

However, in accordance with the policy of the government at the time, NAC Chairman, Mr. Abdel Hadi Mahfouz expressed his support to the Al-Manar channel, controlled by the Hezbollah<sup>1</sup>, when the French CSA launched a procedure to ban the broadcasting of this channel on Eutelsat satellites (August 2004). He urged France to respect freedom of expression and organized a national solidarity day.<sup>2</sup> He then threatened French media of retaliation<sup>3</sup>. The Chairman of the National Audiovisual Council also supported Al-Manar when the German government also banned the channel (November 2008).<sup>4</sup>

### **International Cooperation**

In 2001, NAC signed a collaboration agreement with the French CSA.<sup>5</sup>

NAC is a member of the Mediterranean Network of Regulatory Authorities (MNRA)<sup>6</sup>. During the 14<sup>th</sup> Plenary assembly of the network (Lisbon, 22-23 November 2012), NAC insisted on the need for regulation bodies to comply with the law and regulations when they investigate the content of programmes.<sup>7</sup>

NAC has also become a member in 2009 of the Francophone Network of Media regulators (REFRAM)<sup>8</sup>.

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See Nayla Razzouk, *Lebanon: Protests over TV Hezbollah parody*, Middle East Online, Beirut, 02 June 2006; <http://www.middle-east-online.com/english/?id=16632>

Also see: *Terrorisme et humour : une émission satirique critiquant le Hezbollah a été diffusée sur la chaîne libanaise LBC*, The Intelligence and Terrorism Information Centre, 25 June 2006; [http://www.terrorism-info.org.il/data/pdf/PDF\\_06\\_169\\_2.pdf](http://www.terrorism-info.org.il/data/pdf/PDF_06_169_2.pdf)

<sup>1</sup> See below, the section on Manar-TV

<sup>2</sup> "Solidarity Day on 12<sup>th</sup> August with Hezbollah TV", AFP, 2<sup>nd</sup> August 2004; *L'Orient Le Jour*, 3<sup>rd</sup> August 2004, mentioned in Mr. KNOBEL, "Le Conseil national de l'Audiovisuel libanais organise le 12 août prochain une journée de solidarité avec la chaîne de télévision antisémite Al Manar pour empêcher une non diffusion de cette chaîne sur le territoire français", CRIF, <http://www.crif.org/fr/tribune/Le-Conseil-national-de-l-Audiovisuel-libanais-organise-le-12-ao>

<sup>3</sup> AFP mentioned in "Manar: Beyrouth menace les médias français de représailles", *La Libre Belgique*, December 11<sup>th</sup> 2004, <http://www.lalibre.be/culture/mediastele/article/196982/al-manar-beyrouth-menace-les-medias-francais-de-represailles.html>

<sup>4</sup> "More condemnation for the German decision to Ban Al-Manar", Al-Manar, 25<sup>th</sup> November 2008, mentioned on the website Moqawama.org, <http://www.english.moqawama.org/essaydetails.php?eid=5771&cid=220>

<sup>5</sup> Signature of a CSA-NAC agreement (Lebanon), Announcement of 6<sup>th</sup> September 2001, <http://www.csa.fr/Press-area/Communiqués-de-presse/Signature-d-un-accord-CSA-CNA-Liban>

<sup>6</sup> <http://www.rirm.org/>

<sup>7</sup> MEDITERRANEAN NETWORK OF REGULATORY AUTHORITIES, Final communication. 14<sup>th</sup> Plenary Assembly of the Mediterranean Network of Regulatory Authorities, Lisbon, Portugal, November 22<sup>nd</sup> and 23<sup>rd</sup> 2012

<sup>8</sup> <http://www.refram.org/>

## 4. DELIVERY SYSTEMS FOR AUDIOVISUAL SERVICES

In Lebanon, television services are provided according to different systems: analogue television without subscriptions on ultra high frequency (UHF) bands, cable and wireless television without licence, Multipoint Video Distribution System (MVDS) and direct to home broadcasting (DTH). The main digital television services are provided by satellites operators and digital video broadcasting operators using a satellite Multipoint Video Distribution System (DVB-MS)<sup>1</sup>.

### 4.1 Number of households and number of TV households

The number of households was estimated in 2009 by the Central Administration of Statistics (CAS) at 930,500<sup>2</sup>. AGB STAT IPSOS, entity in charge of audience measurement in Lebanon, defines the universe as 3,912 million TV households in 2011<sup>3</sup>. The penetration rate for television lies in the approximate range of 85 %.

### 4.2 Terrestrial broadcasting

#### 4.2.1 Terrestrial analogue television

Lebanese terrestrial television broadcasters in ultra high frequency bands use analogue transmitting networks and multiple transmitters<sup>4</sup>.

#### 4.2.2. Digital terrestrial television (DTT)<sup>5</sup>

By signing the Geneva Convention in 2006, Lebanon agreed to switch to DTT in 2015. A consultation document was circulated in 2008 by the authority.<sup>6</sup> In April 2012, the Council of Ministers voted to establish a committee in charge of ensuring the transition, and private televisions have been approached.

If they agree to the principle, they however subject their involvement in the project to regulation of the cable market, presently widely illegal. A project was developed by TRA (*Telecommunication Regulatory Authority*) and must be submitted to the Council of Ministers for approval. The Ministry of Telecom takes until end 2014 to deploy new networks.

One first pilot project, with transmission sites for public television Télé-Liban, should have been launched early 2013. But the project must first be presented to the Council of Ministers and be approved.

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<sup>1</sup> "Switching from analogue to digital television: The big picture in the Arab region", *ITU News*, ITU, No. 2 2012, <https://itunews.itu.int/Fr/2371-Passage-de-la-television-analogue-a-la-television-numerique.note.aspx>

<sup>2</sup> Characteristics of population and households in Lebanon, Central Administration of Statistics, Chair of the Council of Ministers, Beirut, April 2012, p.14

<sup>3</sup> TNS TV Panel Diary, Lebanon 2011 quoted in EURODATA-TV Worldwide, *One Year TV Worldwide- One Television Year* Paris, March 2012.

<sup>4</sup> Ibid.

<sup>5</sup> *Progress Report June 2011- June 2012*, Ministry of Telecom, Beirut, [http://www.mpt.gov.lb/mpt/images/stories/MOT\\_brochure\\_fr%5B1%5D.pdf](http://www.mpt.gov.lb/mpt/images/stories/MOT_brochure_fr%5B1%5D.pdf)

<sup>6</sup> Telecommunication Regulatory Authority, Digital migration Strategy for TV Broadcasting, Consultation Document, November 2008 , <http://www.tra.gov.lb/Digital-Migration-Strategy-for-TV-Broadcasting-plan>



### 4.3 Cable television

In Lebanon, cable is operational through two companies: Cablevision<sup>1</sup> and Econet. The Cablevision network is in fact a MVDS network under DVB standard and not a coaxial cable network. The network covers about 75 % of Lebanese territory.

An IPTV service was launched in May 2008 by France-Telecom (Orange Business service) and Solidere (the Lebanese Company for the Development and Reconstruction of Beirut Central District)<sup>2</sup>. The collaboration agreement was renewed in March 2012.<sup>3</sup> At its launching, the network was one of the first IPTV networks in the Middle East and the only one to provide HDTV and demand services. The service offers 120 television channels, broadcast on an Ethernet Metro network. Service subscribers receive an integrated domestic gateway and a top box set including a PVR, which also allows deferred consumption and VoD services. Each subscriber has a free speed of 100 Mbps ensuring enough bandwidth for swap of three television channels simultaneously, and broadband Internet access.<sup>4</sup>

Hundreds of pirated cable operators provide services at 10 USD (7.6 EUR). At this amount, operators offer all channels of the Showtime, Orbit and ART multi-channel units, but also French channels, available from the BIS multi-channel unit of ABSAT<sup>5</sup>. Categories showing the highest number of subscriptions to pay-television in Lebanon are films and television series. Sports ranks third<sup>6</sup>.

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<sup>1</sup> <http://www.cablevision.com.lb/>

<sup>2</sup> "Orange Business Services and Solidere bring IPTV to Lebanon Beirut's", Alwaba News, 19 October 2008. <http://www.albawaba.com/news/orange-business-services-and-solidere-bring-iptv-lebanon-beirut%E2%80%99s>

<sup>3</sup> Orange Business Services renews next-generation telecoms service contract in Lebanon, Orange Business Service, 5 March 2012, [http://www.orange-business.com/mnc/press/press\\_releases/2012/solidere.html](http://www.orange-business.com/mnc/press/press_releases/2012/solidere.html)

<sup>4</sup> «Orange Business Services and Solidere bring IPTV to Lebanon», AME Info, 20 October 2008, <http://www.ameinfo.com/172113.html>

<sup>5</sup> See *Télénumérique*, 9 November 2009. <http://www.telesatellite.com/questions/reponse.asp?question=86139&page=128>

<sup>6</sup> *Arab Media Outlook 2009-2013, Inspiring Local Content, Forecasts and analysis of Traditional and Digital Media in The Arab World*, Dubai Press Club, UAE, p. 98; <http://www.fas.org/irp/eprint/arabmedia.pdf>



#### 4.4 Satellite television

Lebanese cities are lined with satellite dishes and almost each urban household owns a satellite dish which offers over 800 free channels. Satellite is the most common, the most efficient and the most favoured broadcasting media for Lebanese households.

According to data published by the European operator Eutelsat in 2010, Lebanon had 853,000 TV households, including 797,000 which are equipped for satellite reception<sup>1</sup> that is 83.9 % of TV households are equipped. Data from the *Establishment Survey 2011 used by TNS*, in 2011, indicate a lesser rate of penetration as they estimate that 16.1% of TV households receive satellite television. For cable, satellite reception represented 94.5%<sup>2</sup>.

The European satellite operator Eutelsat ensures transmission of almost all Lebanese channels. Eutelsat announced in 2010: 755,000 Lebanese households received transmission of Hotbird™ signals. The same number of Lebanese households is likely to receive satellite signals (DTH/SMATV). The Egyptian satellite Nilesat and the Arab satellite Arabsat ensure transmission of Lebanese channels to reach the Arab world. Lebanon uses Hot Bird to broadcast in Europe, and Telestar to broadcast in North America.

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<sup>1</sup> EUTELSAT, Cable and Satellite TV Survey 2010; <http://www.eutelsat.com/products/pdf/cable-satellite-survey-2010.pdf>

<sup>2</sup> EURODATA TV, *One television Year in the World 2012*. Médiamétrie, Paris, 2012.

#### 4.5 Internet television

As for the rest of the world, reception of live channels on Internet (fixed or mobile) is possible in Lebanon. Channels available are inventoried on websites such as Global Internet TV<sup>1</sup>, IPTV Guide<sup>2</sup> or Lyngsat Stream<sup>3</sup>.

The following table lists channels available online

 Al Iman TV	 Al Jadeed
 Al Waad Channel	 Al-Manar TV
 Future TV	 LBC
 FM TV	 LBC Europe
 OTV	 Al Mayadeen TV
 Noursat	 MTV

Sources: Lyngsat: <http://www.lyngsat-stream.com/tvcountry/Lebanon> and <http://www.global-itv.com/itv.com>

Web-TV channels may also be received through aggregator services, which insert the signal in their own player. A web-TV channel aggregator such as Livestation for example offers 14 Arabic news channels (including Al Jazeera, BBC, France 24, Euronews, RT, CNBC, Deutsche Welle, Sky News)<sup>4</sup>.

The Arab Media site offers channels in streaming from different Arab countries, including five Lebanese channels<sup>5</sup>: LBC, Future TV, Al Manar TV, Al Mayadeen TV, and OTV. The French TV-Direct.fr site offers Al Manar, Al Quds and MTV Lebanon<sup>6</sup> in streaming.

<sup>1</sup> <http://www.global-itv.com/>

<sup>2</sup> <http://www.iptv-guide.com/>

<sup>3</sup> <http://www.lyngsat-stream.com/>

<sup>4</sup> <http://www.livestation.com/en/wsjs#>

<sup>5</sup> <http://www.arabe-media.com/tvlebanon.php>

<sup>6</sup> <http://www.tv-direct.fr/liban.php>

#### 4.5.1 *Applications smartphones and tablets*

Finally signals of television channels may also be obtained on PC or tablet via applications available in "Application stores" such as iTunes Stores (Apple), Google Play Store (Google), Amazon Appstore for Android (Amazon).

Applications allowing access to the LBC1 channel, LBCI News service, to MTV Al Lubnaniya, Al Jadeed as well as the main international Arab, European and American channels are available on the Lebanese iTunes Store. It should be noted however that the iTunes Store dedicated to Lebanon, offers access to 200 news sources for Lebanon from over 30 press publishers in Arabic, French and English.

As for Google Play Store (used to be "Android Store"), Lebanon is part of the countries where free applications<sup>1</sup> and paying applications<sup>2</sup> may be distributed. Free applications allowing access to both Lebanese channels LBCI<sup>3</sup> and MTV<sup>4</sup> are available on Google Play Store.

#### 4.5.2 *The "Lebanese multi-channel unit" on French IPTV operators*

Since 2010, French ADSL television operators (Free, SFR, Orange, Virgin, Bouygues Telecom), offer "the Lebanese multi-channel unit" including 7 Lebanese channels (LBC, ÔTV, Future Television, NBN, MTV Al Jadeed, and M hits).<sup>5</sup> The Lebanese unit corresponds to the needs of the Lebanese Diaspora living in France. More widely, it groups in one unit a set of Lebanese channels which share the objectives of entertainment and promotion of Lebanese culture. In addition to television channels, the unit offers TV Replay.

The Lebanese unit also offers a branded channel on YouTube<sup>6</sup> and a Facebook<sup>7</sup> page.

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<sup>1</sup> <http://support.google.com/googleplay/android-developer/bin/answer.py?hl=en&answer=138294>

<sup>2</sup> <http://support.google.com/googleplay/android-developer/bin/answer.py?hl=en&answer=143779>

<sup>3</sup> [https://play.google.com/store/apps/details?id=mobi.foo.lbcinews&feature=more\\_from\\_developer#?t=W251bGwsMSwyLDEwMiwibW9iaS5mb28ubGJjaW5ld3MiXQ..](https://play.google.com/store/apps/details?id=mobi.foo.lbcinews&feature=more_from_developer#?t=W251bGwsMSwyLDEwMiwibW9iaS5mb28ubGJjaW5ld3MiXQ..)

<sup>4</sup> [https://play.google.com/store/apps/details?id=com.MtvZackAnton.mtvapplication&feature=related\\_apps#?t=W251bGwsMSwxLDEwOSwiY29tLk10dphY2tBbnRvbi5tdHZhcHBsaWNhdGlvbjJd](https://play.google.com/store/apps/details?id=com.MtvZackAnton.mtvapplication&feature=related_apps#?t=W251bGwsMSwxLDEwOSwiY29tLk10dphY2tBbnRvbi5tdHZhcHBsaWNhdGlvbjJd)

<sup>5</sup> <http://www.bouquet-liban.tv>

<sup>6</sup> <https://www.facebook.com/pages/Bouquet-TV-Libanais/283271861737416>;  
<https://www.facebook.com/pages/Bouquet-TV-Libanais/283271861737416>

<sup>7</sup> <https://www.facebook.com/pages/Bouquet-TV-Libanais/283271861737416>

## 5. THE LEBANESE TELEVISION LANDSCAPE

### 5.1 Lebanese Media: between communitarianism and search for credibility

Lebanon has always ranked among the most open countries in the region: its media prove it. Freedom of expression is one of the fundamental characteristics of the Lebanese audiovisual and press landscape. It is evidenced notably by the richness of its written press and audiovisual landscape. Other than heated political debates on Lebanese television channels, the freedom of tone of humoristic programmes attacking politicians is unique of its kind at the regional level and contributes, even relatively, to the deconsecration of the political class<sup>1</sup>.

Community feudalism, which is the determining factor in the establishment of the State, also plays an important role in structuring the audiovisual sector. There is a close relation between communitarianism and the audiovisual sector in the country. The near absence of the notion of national public media fostering a national culture going beyond community limits gave free rein to structuring and reinforcing the communitarian via the audiovisual sector. Political parties which are closely related to their communities have their channels.

Consequently, the grasp of political parties on media is inevitable. *State television and radio have literally been liquidated by successive governments under economic pretexts, whose members sometimes had, depending on their political affiliation, their own press bodies. This monopoly prevents the emergence of a civil society in a country ever more communitarized, where isolation has replaced the "living together", however at the base of the Lebanese consensus .... In addition to blocking any attempt of civil and democratic construction, the community media system is characterised by extreme fragility. Attacking a media means attacking a community, or even a religious symbol. In the Lebanese consensual and confessional democracy, this type of attack may cause a serious crisis which may deteriorate in a civil war.*<sup>2</sup>

Like the new political structure marking Lebanon since the assassination of the ex-Prime Minister Rafiq Hariri in 2005, the Lebanese media landscape is polarized between *the March 14th Movement* and *The March 8th Alliance* consisting mainly of community parties.

Thus, the coalition of 14th March has two channels owned by the Hariri family: *Future TV*, and the international satellite news channel *Ekhbariat-Al-Moustaqbal*, which started broadcasting in 2007. In addition, the same coalition is particularly supported by the first newspaper in the country, *An-Nahar*, the French-language daily *L'Orient Le Jour*, and unquestionably by the press institution of the Future Party, the daily *Al-Moustaqbal*.

The 8<sup>th</sup> March Alliance also benefits from the support of several audiovisual media: the channel *Al-Manar*, owned by the Hezbollah, and the channel *NBN*, which belongs to Nabih Berry, chairman of the National Assembly and head of the Shiite movement Amal. Though its owner, Michel Aoun, invited all Lebanese citizens to subscribe to its capital, *OTV* may also be assimilated to an opposition channel. As to *New TV*, with a communist tendency, it clearly takes stand against the government, even though it does sometimes timidly criticize the opposition.

In the same context, some Arab media are involved in this game of political media alliance. While the Saudi news channel *Al-Arabiya* supports the coalition of 14th March, along with the London-based pan-Arab *Al-Hayat* and *Al-Sharq-Al-Awsat*, *Al-Jazeera* and the daily *Al-Quds-Al-*

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<sup>1</sup>Jamil Abou Assi, *Lebanese media: between confessionalism and search for credibility, Community media and freedom of press: communitarianism as a threat to freedom of expression*, 9 September 2009, Mediterranean Strategy Observatory, <http://www.strategicwatch.blogspot.com/>

<sup>2</sup> Ibid

*Arabi* rather take stand for member formations of the parliamentary opposition, notably Hezbollah.

Thus, this political media crack is at the origin of the drifting of the media discourse driven by a political discourse carrying accusations of all sorts. *"In absence of an objective reading of the Lebanese political situation, it is no exaggeration to say that the Lebanese Media, pretending to be leaders in the region in terms of information, sometimes carry a discourse of rejection of others and propaganda which has relatively contributed to setting a climate of suspicion between communities"*.<sup>1</sup>

However, the true disjunction in the Lebanese media landscape goes back to the adoption, by the UN Security Council, of the 1559 resolution, on 2nd September 2004. Adopted by a majority of UN Security Council members, in order to force Syria to modify its interference policy in Lebanese politics and withdraw from Lebanon, it had a particularly important effect on media in the country, which will quickly be divided based on whether they are favourable or opposed to this resolution.

The suicide terrorist attack of 14th February 2005 in Beirut, which took the life of the previous Lebanese Prime Minister, Rafiq Hariri, presented by part of the Lebanese citizens as a political consequence caused by the 1559 resolution, worsened the division of Lebanese media, which became true propaganda institutions for the two sides which formed after the renewal, imposed by Syria, of previous President of the Republic Emile Lahoud mandate.

This political crisis, which lasted over three years, was marked by a propagandist media discourse held by media belonging to different Lebanese protagonists. Channels belonging to the Hariri family, not taking into account the principle of the presumption of innocence, did not hesitate to openly accuse Syria as well as some formations from the opposition, of complicity in the attack which struck the country. On the other side, the media of the opposition have also conveyed a discourse which is no less dangerous, accusing the coalition of 14th March of being agents for US and Israel interests.<sup>2</sup>

Several media projects emerged under the title of private initiatives. But their editorial line whether they defend or attack either one of the two coalitions, qualifies them as partisan supports. This is the case in principle of the daily *Al-Akhbar*<sup>3</sup>, which editorial line is clearly close to the opposition, as well as the Internet information site *Now Lebanon* <http://www.nowlebanon.com/> which supports the coalition of 14th March.

Despite the diversity and richness of the Lebanese television landscape, media discourse based on criticism and rejection is far from establishing the foundation of a true secular civil society. The partial treatment of Information raises interrogations about the credibility of Lebanese channels and rather contributes to enhancing confessionalism and communitarianism; all the more so as the creation of new channels corresponded to a double financial and political objective.

In spite of the scarcity of advertising revenues on the Lebanese audiovisual market, the confessional character of media and the regional and international interference in the political affairs of the country allowed an abundance of funds dedicated to creating communication tools. According to a militant in an opposition party, important sums of money are allocated to political parties to create Internet information sites, radios and televisions.

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<sup>1</sup> Ibidem

<sup>2</sup> Ibidem

<sup>3</sup> <http://www.al-akhbar.com/>

## 5.2 Information tool or vector of propaganda: the ambiguous game of Lebanese channels

In theory, such a media landscape marked by diversity of opinions and strong freedom of expression would have contributed to the development of democracy. But as highlighted by Abi Assi, who distinguishes two categories of media coexisting in the Land of Cedars, "*in the confessional and consensual Lebanese democracy, reality is more complex*".

In January 2011, a change of political alliances caused the overthrowing of the government in place and roles got reversed: loyalists (mainly grouped around the Future Party, led by Saad Hariri), and the Lebanese Forces (lead by the former leader of Christian militias Samir Geagea representing the popular majority at the time), find themselves in today's opposition. It is however easy to distinguish, after this date, two categories of media in Lebanon: media affiliated to the coalition of 14th March and media affiliated to the bloc of 8th March, led by the Shiite Hezbollah and the Christian general Michel Aoun, previously representing the opposition.

### - Media Affiliated to the Coalition of 14th March:

The creation of the 14th March coalition in October 2004 managed to rally several media to its strategic vision calling for a democratic Lebanon in the true sense of the term and free from any foreign, mainly Syrian, interference. Among these media considered as loyalists or from the majority, we may distinguish LBC and Future TV or *Al-Moustaqbal*.

### - Media Affiliated to the Bloc of 8th March:

Renowned as the bloc of 8th March, the opposition is also supported by some television channels with non-negligible economic weight and media influence which continuously rival the so-called loyalist media.

Indeed, with heterogeneous components but united around the contestation of the 1559 resolution, the Lebanese opposition was reinforced thanks to the agreement with Hezbollah and the Free Patriotic Movement; which granted the Shiite movement a strong Christian base. Similarly to the coalition of 14th March, several media openly belong and/or support the opposition.

We shall thus distinguish: *Al Manar TV*- this is the official media of Hezbollah that the members of this party also call "resistance media"; the National Broadcasting Network or *NBN* belonging to the chairman of the Lebanese Parliament, Nabih Berry; *OTV* (Orange TV) owned by General Michel Aoun; and *New TV* or *television Al-Jadeed*.

### 5.3 Number of channels established in Lebanon

The Arabic version of the website of the Ministry of Information provides a list of eight "first class" television channels<sup>1</sup>.

Broadcasters	Licence date	Address	Telephone	Fax
Lebanese Broadcasting Corporation LBCI	21/03/97	ADMA	9850850	9850916
National Broadcasting Network NBN	21/03/97	Wing versus Alsamarland	1841020	1841029
Future	21/03/97	Beirut Street Spears white building	1355355	1753232
Murr Television MTV	21/03/97	Debate - near Mstvy eye and ear building mtv	4444000	4523111
Lebanon TV		Hill Khayat Kornish TV	1786930	1786931
Lebanese Group El-Manar	05/11/98	Beirut - Bir Hassan Al-Manar building	9611276000	9611553138
New TV NEW	10/02/00	Wata Musaytbeh Beirut - Lebanon	1303300	01818389
Lebanese Media OTV	30/06/06	Fil - Horsh steady near Hotel Habtoor Jiedko Centre fifth floor	1311209	

However, the above list does not include all channels established in Lebanon. Channels broadcast on satellite<sup>2</sup> should be added:

#### Other channels broadcast on satellite in Lebanon (January 2013)

Name of the channel	Satellites	URL	Other sites	Concept
Al Iman TV	Eutelsat 7 West A	<a href="http://www.alimantv.com/">http://www.alimantv.com/</a>	<a href="http://www.youtube.com/alimantv">http://www.youtube.com/alimantv</a>	Religious Shiite channel
Al Waad Channel	Eutelsat Hot Bird 13 B	<a href="http://www.al-waad.tv/">http://www.al-waad.tv/</a>		Christian channel
Al Lubnania	Eutelsat 7 West A	<a href="http://al-lubnania-tv.lebanontvs.tel/">http://al-lubnania-tv.lebanontvs.tel/</a>		
Al Quds TV	Arabsat 5A, badr, 4, Eutelsat 7 West A	<a href="http://www.qudstv.com/">http://www.qudstv.com/</a>		Palestinian channel, close to Hamas. With a licence from OFCOM (GB) <sup>3</sup>

<sup>1</sup> <http://www.ministèreinfo.gov.lb/main/MediaMap/AudioVisual.aspx/>.

<sup>2</sup> We base our work on the list established by Lyngsat Address, consulted on 25<sup>th</sup> January 2013: <http://www.lyngsat-address.com/tv/Lebanon.html>

<sup>3</sup> <http://www.ofcom.org.uk/static/tvlicensing/cs/1758.htm>

Alsumaria TV	Intelsat 15, Eutelsat 25 A, Eutelsat Hot Bird 1B	<a href="http://www.alsumaria.tv/">http://www.alsumaria.tv/</a>		Iraqi channel
Al-Zahra TV	<a href="#">Eutelsat Hot Bird 13B</a>	<a href="http://zahratv.com/">http://zahratv.com/</a>	<a href="http://zahratv.com/live/zahratv.php">http://zahratv.com/live/zahratv.php</a>	Shiite Channel
Arab Woman	Nilesat 102	<a href="http://www.arabwomantv.com/">http://www.arabwomantv.com/</a>	<a href="http://www.youtube.com/user/ArabWomanTV">http://www.youtube.com/user/ArabWomanTV</a>	Channel addressing Arab world women
Arabica Music	<a href="#">Nilesat 102</a> , Anic F3 (Dish USA)	<a href="http://www.arabicamusic.tv/">http://www.arabicamusic.tv/</a>		Musical Channel
Asiasat	NSS 12, Eutelsat 7WA	<a href="http://www.asiasat.tv/">http://www.asiasat.tv/</a>	<a href="http://www.youtube.com/asiasatonline">http://www.youtube.com/asiasatonline</a>	News Channel
Future International	Badr 4, Eutelsat T West A	<a href="Http://www.futuretvnetwork.com">Http://www.futuretvnetwork.com</a>		Future TV Channel addressing the Diaspora (Europe)
Future TV USA	Intelsat 19, Intelsat 21, Anick F3	<a href="Http://www.futuretvnetwork.com">Http://www.futuretvnetwork.com</a>		Future TV Channel addressing the Diaspora (United States)
LBC Europe	Badr4, Eutelsat 21B, Eutelesat 7 West A	<a href="http://www.lbcgroup.tv/">http://www.lbcgroup.tv/</a>		Channel of the LBC group addressing the Diaspora (Europe)
LDC Lebanese Diaspora Channel	Eutelsat 21B, Eutelsat 7 West A	<a href="http://www.lbcgroup.tv/">http://www.lbcgroup.tv/</a>		Channel of the LBC group addressing the Diaspora (Europe)
Marah 7: (Fun channel)	Nilesat 102	<a href="http://www.marah.tv/">http://www.marah.tv/</a>		Entertainment Channel
Nour	Eutelsat Hot Bird 13 B, Eutelsat T West A	<a href="http://www.nourtv.net/">http://www.nourtv.net/</a>	<a href="http://www.youtube.com/thenourtv">http://www.youtube.com/thenourtv</a>	Muslim Religious channel
Noursat	Intelsat 19, Eutelsat Hot Bird 13B, Eutelsat 10A, Eutelsat 7 West A, Intelsat 21, AnikF (Dish USA)	<a href="http://www.noursat.tv">http://www.noursat.tv</a>		Catholic Religious channel
Taha Kids	Eutelsat 25 A, Eutelsat 7 West A	<a href="http://www.tahatv.com/">http://www.tahatv.com/</a>	<a href="http://www.youtube.com/user/TahaTvChannel">http://www.youtube.com/user/TahaTvChannel</a>	Kids channel

Source: European Audiovisual Observatory according to Lyngsat Address<sup>1</sup>

In total, the number of television channels established in Lebanon is then 26:

- 1 public channel (Télé-Liban)
- 8 private "class 1" channels
- 17 other channels broadcast on satellite

<sup>1</sup> In some cases, the verification of the institution in Lebanon can only be based on very tenuous indications, in particular the telephone area code of the call number indicated on the website.



## 5.4 Public offer



### 5.4.1 *Télé Liban*

The company Télé-Liban<sup>1</sup>, in its present form, is the result of the merger between two private companies:

- The first television channel in the Middle East: the Lebanese Company of Television-CLT founded in 1959, based at Tallet el Khayat- Beirut, and
- Télé-Orient (Lebanon and Middle East Television Company), born in 1961 and which head-office is at Hazmeyah – Mount Lebanon.

It is to be noted, that thanks to CLT, Lebanon became in 1967, the third country to broadcast in SECAM- colours.

In 1977, the deterioration of the political situation and economic conditions in Lebanon due to the civil war, as well as the deterioration of the advertisement market, resulted in the merger of CLT and Télé-Orient and to the creation of Télé-Liban. While giving the channel the exclusive right to operate television channels in Lebanon until 2012, the Lebanese State bought 50% of its shares, against 50% of shares reserved to the private sector<sup>2</sup>.

Between 1978 and 1996, the share of the private sector was subject to many changes. In 1996, the Lebanese State bought all the shares of the private sector and became the sole owner of the company which did not acquire the status of public institution in the true sense of the word and remains subject to trade legislation.

In 2000, the Council of Ministers decided to shut down Télé-Liban for three months from February to May 2001, in order to restructure the operating system and stop financial losses. Upon reopening on 25<sup>th</sup> May 2001, Télé-Liban had a very small monthly budget of 140,000 USD. It was increased a few months later and is today 400,000 USD, including 320,000 USD dedicated to the salaries of 280 employees.

It is worth noting that on the practical level, Télé-Liban has never exercised the exclusive right of operating television channels in Lebanon which was granted by the State at its appropriation. Since 1986, private television channels have multiplied and Télé-Liban did not take any advantage from it. All the more so as law 94/382 on the audiovisual sector allows the creation of private channels without any returns for Télé-Liban, thus depriving it of the exclusive right granted until 2012.

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<sup>1</sup> <http://www.teleLebanon.com.lb/>

<sup>2</sup> Appropriation announced in executive order No.100 published in the Official Journal of 7<sup>th</sup> July 1977. Document provided to us by NAC during our data collection mission in Lebanon (October 2012)

Télé-Liban operates on a budget from the Ministry of Information and its board of administration is appointed by the Government which reserves the right to end their mandate with no obligation to explain.

#### *Production and programming*

One of the most important characteristics of Télé-Liban was the production of television series and all types of programmes until 2001. Its production continues to be requested and broadcast by other channels to the present.

But taking into account the small budget dedicated by the State to Télé-Liban, the channel has simply stopped any production since 2011.

Programming is based on:

- The news and political debate programmes which require a limited number of employees to produce;
- Archive programmes;
- Arabic television series offered at no cost to the channel by Egyptian, Syrian and Jordanian television channels.

According to the NGO Panos Institute Paris, *"An analysis of the programming schedule of national television shows that out of 7,560 minutes of weekly programmes only 900 minutes were dedicated to children, youth and culture, i.e. 11.9% while there were no programmes for sports.*

*The news report is almost exclusively dedicated to covering activities of the President of the Republic, the Prime Minister and the Chairman of the Assembly as well as announcements by representatives of most influential parties. This means that national television becomes the official communication body of the Government and large political parties, in an approach which totally ignores media coverage and investigative journalism about subjects of general social interest"<sup>1</sup>.*

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<sup>1</sup> *Civil society mobilizes for a true audiovisual public service mission*, PSB Newsletter, issue 11, Panos Paris-Omec, June 2011, p.3; [http://www.panosparis.org/IMG/pdf/PSB\\_newsletter\\_JUIN\\_2011\\_FR.pdf](http://www.panosparis.org/IMG/pdf/PSB_newsletter_JUIN_2011_FR.pdf)

## 5.5 Main private television channels



### 5.5.1 LBC / LBCI group

LBC is the incumbent channel of the LBCI or LBC International group <sup>1</sup>. Founded in 1985 by Lebanese Forces, which financed it until 1992, LBC is an exception because of its origins, which date back to the 1985, as LBC was the official organ of Lebanese Forces.

It is derived from the hard-line Lebanese Christian right-wing, then is ruled its CEO, "sheik" Pierre Daher, and finally conforms to the new regulations for Lebanese media put in place following the Taif agreement. In 1991, Daher reinforces the commercial orientation of the channel and manages to classify LBC among the rare private channels able to reach a regional audience.



### 5.5.2 LBC International

Parallel to the terrestrial channel, a satellite channel (LBC International) is launched in 1996. While all channels in the region operated on a model where financial losses mattered less than political gains in terms of influence, LBC was also distinguished as being probably the only regional business truly private and profitable. The recipe is simple: sell "available brain time" to large companies active on the market of Arab consumption exploiting the Lebanese assets at the regional level.

In fact, starting from 1996, Pierre el-Daher accelerated the expansion of the LBCI group, thanks to the licence obtained by LBCI to broadcast via satellite in 1997. He created new companies, local and international, including LBC SAT, which broadcasts in the whole Middle East, in 2003, when the Kingdom Holding of Al-Waleed ben Talal took a stake, at 49 %, into the capital of LBC. At the time, comments about this alliance dealt mainly with issues around how the Saudi group would regard the audacious (and even scandalous) editorial line of the Lebanese channel. And there have been some issues, about religious matters (statements of Adonis about the Koran) and mainly on sexual matters (upon the sensational confessions of a Saudi woman chaser).

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<sup>1</sup> <http://www.lbcgroup.tv/>

Nevertheless, the most important consequences occurred elsewhere. Inevitably, the arrival of the Saudi prince has indeed led to a conflict of interest between, on one hand, his own company, Rotana Media Services, and, on the other hand, Antoine Choueiri, the boss of the most important Arab advertising network, very close to LBC since the beginning.

In 2008, through an increase in capital, the Saudi prince Al-Waleed ben Talal became a majority shareholder (85%) in LMH, the holding which groups LBC SAT, PAC (The Production and Acquisition Company, which produces inter alia the programmes of LBCI) and LBC Plus (LBC Europe, LBC Americas and LBC Australia). LBCI remains between the hands of its Lebanese shareholders.

However, as noted by Yves Gonzalez-Quijano<sup>1</sup>, today, the surprising *success story* of LBC is on the way to becoming only a memory. Of course, this descent into the abyss started in 2007 when the Saudi participation in the capital of the Lebanese channel went to 85 %.

In May 2009, the group Choueiri lost the advertising network of LBC but kept many others. For Pierre Daher, the consequences of this split have been more serious: after Turki Shabana arrived in 2008, one of the right-hand men of prince Al-Waleed ben Talal, his exclusion was somehow planned.

That is what is happening today. Already weakened by a court decision in November 2010 which made it lose the terrestrial channel "taken over" by the Lebanese Forces, the man who made the success of LBC can no longer oppose the decision of Rotana which alone keeps the studios of Kfaryassine, north of Beirut. Paid by PAC (Production & Acquisition Company), also dominated by Kingdom Holding, the employees of LBC will probably be offered new contracts, with new conditions, affirms Yves Gonzalez-Quijano.

### *Programming and production*

Reality television made a rather belated appearance in the Arab world. The satellite revolution at the end of the 1990s and the explosion of the number of channels in the early 2000's are the factors which enabled this new phenomenon on the regional market. Aired in their original language and format in the beginning, these shows were later adapted to the local audience. Two Lebanese channels LBC and Future TV have succeeded, along with the Saudi channel MBC in introducing and developing reality television industry in the Arab and Mediterranean audiovisual environment.

LBC mainly sells *Entertainment*: it has initiated reality television and celebrity sets with young and sexy presenters. The channel has also imported the concept with the *Miss Lebanon 2003* contest and *Star Academy*. It obtained the rights for several international formats and then launched the channel Nagham Star Academy: first reality television channel broadcasting 24/7 in the whole region.

### *Star Academy or Al Acadimiya*

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<sup>1</sup> Yves Gonzalez-Quijano, *LBC and Rotana: going from the Mediterranean to the Gulf (Al-Waleed 3/3)*, 10 January 2012, Arab Culture and Politics , <http://cpa.hypotheses.org/3213>; Also see: Marie-José Daoud, *Lebanese Forces-LBC: prison sentence requested for Pierre El-Daher*, *Le Commerce du Levant*, November 2010, <http://www.lecommercedulevant.com/affaires/m%C3%A9dias-et-pub/none-Lebanon/forces-Lebanese-lbc%C2%A0-peine-de-prison-requise-pour-pierre-el-daher>

With a desire to achieve the same success of MBC<sup>1</sup> and Future TV channels which used and adapted the concept of western reality television to their screens, the LBC group decides in turn to buy a musical reality television concept, *Star Academy*, in September 2003. In its Arab version, the show becomes *Star Academy, Al Acadimiya* and gets immediate success too. The ninth season announced for 2012 is currently in preparation. The popularity of these shows is always increasing, the channels have established trade agreements with domestic telecom and mobile telephone companies in the countries where programmes are broadcast, (such as Morocco, Tunisia, Egypt, Syria, Lebanon, Jordan, Iraq, Saudi Arabia, Kuwait, United Arab Emirates, and Bahrain) to benefit from considerable income generated by votes from the public.

### *Al Wadi or Celebrity Farm*

In 2005, LBC finds the perfect synergy between reality television and music clips by launching *Al Wadi* inspired by the French show *Celebrity Farm*. Fourteen celebrities settle on a farm North of Beirut to live and carry out daily tasks. The concept is not much different from other programmes of reality television. But the idea that will turn *Al Wadi* into the category of success shows is the appointing of Haifa Wehbe –Lebanese star extremely popular for her quite risqué music clips – as a permanent presenter, who settles each new season at the farm with the candidates. With Haifa in control, *Al Wadi* appeared as the perfect synthesis between both most popular phenomena in the Arab television entertainment industry, the ultimate combination between reality television and sexy clips.

Musical reality television shows or shows featuring Arab artists appeared thus to be the success secret for the industry in the region. Up to 80% Lebanese, aged between 18 and 35 have followed the first seasons of *Star Academy, Al Acadimiya*. Prime time airings of the show, as well as of *Super Star* and *Al Wadi*, are presently regional events dominating conversation.

According to the consultancy firm Arab Advisors Group, advertisement rates on Arab satellite channels during these shows increase by 130 % in comparison to rates during other prime time airings. And when the website of the news channel Al Arabiya publishes an article about one of these three shows; it is generally the most read and most shared of the day. Consequently, Arab reality television is today much more than just a copy of western programmes as the industry has succeeded to develop a strong and particular regional identity<sup>2</sup>. It is worth noting that LBC Sat has also purchased and recovered on its screens *Celebrity Duets* of FremantleMedia Enterprises and *Top Chef* of NBC Universal International Formats<sup>3</sup>.

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<sup>1</sup> The pioneer show of this type of entertainment in the Arab world was *Man Sayarbah Al Mallion?* (*Who wants to be a millionaire?*). Launched in 2000 by MBC and broadcast twice a week, the Arab version of the British show "*Wants to be a Millionaire?*" met real success, becoming the most watched programme in the whole area in 2000 and 2001. With candidates from all Arab countries, "*Man Sayarbah Al Mallion?*" was the first show to represent the diversity of the Middle East and to address a transnational audience by touching on questions related to Arab history, Islamic heritage, and pan-Arab issues such as the Palestinian issue.

<sup>2</sup> Paloma HASCHKE, *When western programmes export to the Middle East*, INA Global the review of creative and media industries, 04.01.2012; <http://www.inaglobal.fr/television/article/quand-les-programmes-occidentaux-s-exportent-au-moyen-orient?print=1>

<sup>3</sup> Arab Media Outlook 2011-2015– Arab Media Exposure and Transition, Forecasts and analysis of Traditional and Digital Media in The Arab World, 4<sup>th</sup> edition, Dubai Press Club, UAE, 2012; <http://www.arabmediaforum.ae/userfiles/EnglishAMO.pdf>



### 5.5.3 Future TV or Al-Moustaqbal<sup>1</sup>

Owned by the Hariri family, *Future TV* was created at the end of the Lebanese civil war in 1993. It enabled its main shareholder, former Prime Minister, the late Rafiq Hariri, to establish a certain representative dominance on the Sunni community of the country. But, since his assassination in February 2005, the channel has widely taken part in an anti-Syrian discourse, and has developed a personality cult of the deceased. During the mini-civil war of May 2008<sup>2</sup>, it was actually attacked and was shut down by Hezbollah militias, which made the channel even more hostile to the opposition, in particular to the Party of God.

The introduction of the television channel *Future TV* in the Lebanese audiovisual landscape and its positioning as a Sunni community channel was both a result and an objective of the new political order established in accordance with the Taif Agreement of 1989, placing the executive power of the country in the hands of the Sunni Prime Minister.

Owner of the channel, Rafiq Hariri, was forced in 1996, to sell part of his shares in order to comply with Law No. 382 of 1994 prohibiting a natural person from holding more than 10% of a television channel. Nevertheless, this procedure did not impact the true management of the channel: Hariri brought his family and a member of the board of administration of a bank belonging to him in the capital of *Future TV* which remains to the present owned by the Hariri family.<sup>3</sup>

The analysis of the Lebanese audiovisual landscape, and mainly the channel *Al-Moustaqbal*, is closely related to the emergence and fame of Rafiq Hariri. Upon his accession to the position of Prime Minister, he deployed the channel as a tool to promote his communication and power strategy. It was utilized for the new political project which was Hariri's dream for the reconstruction of the country and was *considered as the Sunni counterweight to the growing influence of LBC – then owned by the Lebanese Forces, and the official voice of the Maronite community interest – Future TV became the media vector of Lebanese Sunni community*, as highlighted by the observer Jamil Abou Assi<sup>4</sup>. However, this vision which stresses community division is not shared by all media observers.

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<sup>1</sup> <http://www.futuretvnetwork.com/>

<sup>2</sup> Mini-Lebanese civil war: triggered by the decision of the Lebanese Council of Ministers to dismiss the head of security of the airport of Beirut (close to the Hezbollah); it lasted about fifteen days when clashes occurred between Sunnis and Shiites, and Shiites and Druze in several regions of the country. It ended with the signature, on 25<sup>th</sup> May 2008, of the Doha Agreement, which enabled the election of a new President of the Republic. For more information on the events of this period see Alain Chevaléras, *Lebanon on maximum alert*, Research on Terrorism Centre, 8<sup>th</sup> May 2008; <http://www.recherches-sur-le-terrorisme.com/Analyseterrorisme/liban-8-mai-accrochages.html>; See: Alain Gresh, *Liban, vers la guerre civile ?*, *Nouvelles d'Orient* Les blogs du *Diplo*, 9<sup>th</sup> May 2008; <http://blog.mondediplo.net/2008-05-09-Liban-vers-la-guerre-civile>; Also see: Marie Nassif-Debs, *Liban : Le spectre de la guerre civile dans la banlieue sud de Beyrouth*, Committee for the Abolition of Third World Debt (CADTM), 1<sup>st</sup> February 2008; <http://cadtm.org/liban-Le-spectre-de-la-guerre>

<sup>3</sup> Jamil ABOU ASSI, *Future TV: Capitalism at the service of Communitarianism*, INA Global, journal of creative industries and media, 11.10.2010, <http://www.inaglobal.fr/en/television/article/future-tv-capitalism-service-communitarianism?tg=1>

<sup>4</sup> Ibid.



During the first mandate of Rafiq Hariri, *Future TV*, which started broadcasting in 1994, was a wonderful promotion tool for the action of the new government which wanted to present the country as a haven of civil peace and attract Arab tourists and foreign investors. This mode of private communication serving political action had already been used in Egypt, which benefited from the waves of *Nile TV* to promote the tourist industry of the country.

An important issue though remains unresolved: the profitability of the channel. Indeed, advertising revenues of the channel did not cover its expenses. This raises the question of its independence in relation to its shareholder, who was actually the Prime Minister of the time. In 1997, advertising revenues were considered insufficient by Nadim Al-Maoula, former general director of the channel<sup>1</sup>.

During the 90s, the channel programming reflected the political and economic vision of Rafiq Hariri. The strategic relation, approved by the fraternity and collaboration agreement signed between the Republic of Lebanon and the Syrian Arab Republic<sup>2</sup>, has widely influenced the editorial line of the channel. A certain self-censorship may have been applied in the political programmes of the channel, particularly visible when the question of the Syrian presence in Lebanon was raised.

Except for the two years of Salim El-Hoss's government<sup>3</sup>, between 1998 and 2000, when the channel became the most concerned with fighting for plurality and democratic principles, *Future TV* remained a private channel with a very specific mission: defend the interests of a community close to its *leader*, Rafiq Hariri<sup>4</sup>, more than ever.

#### *A media strategy with a political agenda*

As we already highlighted, the adoption of the United Nations 1559 resolution by a majority of UN Security Council members in order to force Syria to stop interfering with the Lebanese political situation, is a historical milestone in the development and structuring of Lebanese media. According to their positioning for or against the resolution, Lebanese Media forged their editorial lines and thus reinforced media communitarianism.

Obviously, the suicide terrorist attack which cost the life of Rafiq Hariri represents, for part of Lebanese citizens, the result of the political crisis generated by the UN decision. The assassination of the former Prime Minister had repercussions on the Lebanese audiovisual landscape which components became unquestionable organs of propaganda for the two sides which formed after the renewal – imposed by Syria – of the mandate of former President of the Republic Emile Lahoud. This crisis, which lasted over three years, forged the contemporary path of Lebanese audiovisual landscape, and was marked by a propagandist media discourse expressed by the media of the various protagonists sharing the political media landscape.

Undoubtedly, *Future TV* heavily suffering from this new political order is no exception to the rule and has, thus, radically changed its editorial line. Openly accusing Syria and Lebanese political

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<sup>1</sup> Ibidem.

<sup>2</sup> A treaty for brotherhood, cooperation and coordination between the Republic of Lebanon and the Syrian Arab Republic – 22<sup>nd</sup> May 1991 - <http://www.senat.fr/rap/r96-111/r96-11114.html>

<sup>3</sup> Salim El-Hoss is a Sunni Lebanese politician. He has been Prime Minister five times (1976-1980, 1987-1990, 1988-1989 (at the same time as Michel Aoun), 1989-1990, and 1998-2000) and deputy for Beirut for a long time. Salim El-Hoss is one of the historic opponents of Hariri and recommends a much less liberal and less pro-Western policy.

<sup>4</sup> Jamil Abou Assi, op.cit.

parties supporting it of destabilizing the country, the channel became hostile to the Syrian regime and its Lebanese partisans. The channel does not hesitate to accuse the Hezbollah and its allies of complicity in the attacks which shook the country.

On the other hand, the Hariri family took advantage of the popular support generated by the assassination of the Prime Minister to reinforce its domination over the Sunni community, by creating, in November 2007, a new 24-hour news channel: Future News or *Akhbar Al-Mostaqbal*. The channel became part of the Future Network – owned by the Hariri family – which comprises already the daily Al-Mostaqbal and the generalist satellite television, Future TV.

The channel at first broadcast in Arabic for seven hours a day, then 24/7 starting from 2008, in world-wide broadcasting. Future News included around 300 employees and correspondents in ten cities, including Paris, Washington, Gaza, Teheran and also Ryad. Compared to those of Al-Jazeera and Al-Arabiya, the budget of the channel was presented as very modest – with no more details – by its managers. Just like the other Lebanese channels, it has drawn on the rejection of the other "Lebanese", and became a tool of propaganda to serve the Future Party, and more generally the Alliance of 14<sup>th</sup> March.

Despite the decision taken by the Hariri family since the end of 2011, to merge both channels *Future TV* and *Future News*, the latter managed during three years, to fulfil the political objective of its creation: serve as a communication tool to focusing Lebanese political life to, on the one hand, the Alliance of 14<sup>th</sup> March led by Sunnis and Lebanese Forces, and on the other hand, the Bloc of 8th March dominated by Hezbollah.

### *Production and programming*

In October 2012, Ramzi Jubayli<sup>1</sup>, CEO of Future TV states that: *"The merger is due to strictly financial reasons. The decision was aimed to reduce expenses in order to face the deficit of Future Network. The budget of Future TV for 2012 is of 32 million USD including 7 million USD dedicated to local production of programmes. The editorial line of Future TV based on a generalist and entertainment programming, will include some reports and news shows. The channel staff consists of 450 employees"*.

With regard to media, Future TV has always been considered among Lebanese entertainment channels with a regional success. With a desire to take advantage of the new infatuation for western television game shows imported on the Arab television screen<sup>2</sup>, Future TV found the perfect balance between reality television and Arabic music at the end of 2002 and announced the purchase of the British *Pop Idol* concept created by Simon Fuller. The final of this show, a few months earlier, had attracted over 13 million viewers and registered a record of 9 million votes.

### *Super Star*

Entitled *Super Star*, this new reality television programme was announced in 2003 as the largest entertainment television production in the Arab world. In this musical reality television

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<sup>1</sup> Statements collected during our interview with the CEO of Future TV at the head-office of the channel in Beirut in October 2012.

<sup>2</sup> The first experience of Future TV with Reality television did not meet the expected success. In 2001, the channel launched *Al Halka Al Ad'af (the weakest link)*, local version of the programme "The Weakest Link" produced by the BBC. Imitating the original concept, the presenter of the show, Rita Khoury, had to adopt not only the same acerbic and authoritarian personality as the British presenter, Anne Robinson, but also the same appearance: short hair, strict glasses and black clothes. Reproduced without cultural adaptation, the concept of a deliberately masculine woman who humiliates candidates in public did not go down well. The show caused an outcry and was not renewed.



show, Arab culture is the main theme: the singers and jurors are Arab. *Super Star* proved successful. During the last week, the show registered over 4.8 million votes for the first season in 2003, about 10 million the following year, and, still for the same week, over 15 million votes in 2005<sup>1</sup>. Ending in 2008, *Super Star* lasted five seasons, produced major artists who are today present on the Arabic musical scene such as Diana Karazon, Rouwaida Attieh or Melhem Zein and engraved the name of Future TV in the book of regionally successful Lebanese channels.

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<sup>1</sup> Paloma HASCHKE, *Quand les programmes occidentaux s'exportent au Moyen-Orient*, INA Global, the journal of creative industries and media, op.cit.



#### 5.5.4 Manar TV<sup>1</sup>

Founded on 3<sup>rd</sup> June 1991, Manar TV is the official media outlet of the Hezbollah, that the party members also call the "Resistance media". In meeting the political objective of its creation which consisted in supporting the party in its 'Lebanonization' process, Al-Manar, communication service of Lebanese Hezbollah, qualifies itself as a "*Lebanese television station with a mission [to enhance] the civilizing role of the Arab and Islamic community*", and is glad to be "*the first institution to wage a psychological war against the Zionist enemy*"<sup>2</sup>.

The channel is part of the Lebanese Information Group (GLI), an independent media company with partners in favour of the party's policy. The language of broadcasting is Arabic but the news is also presented in French and English. It mainly offers the news and magazines dedicated to the Israeli military occupation, interspersed with entertainment shows. The editorial line of the channel is thus characterized by open Islamic nationalism, anti-Americanism and anti-Semitism.

Since 2004, the discourse of the channel followed that of the party which finances it by denouncing foreign influences on internal Lebanese politics, going as far as accusing the members of the majority of treason against the nation. But it can be estimated that this conservative discourse could have been beneficial to the channel, which managed through the years to acquire a degree of fame exceeding the popular base of Hezbollah. The channel's important audience among the populations of the Middle East and the Maghreb is proof to this.

Besides, despite an editorial line set on notions of integrity of Lebanon and defence of citizen interest, Al Manar remains a religion-based channel first and foremost, whose objective is to defend the interests of Hezbollah and the Shiite community. Like most media in the country, it contributed to enhancing communitarianism which, according to many observers, is irrevocably dividing the Lebanese population<sup>3</sup>.

- *A textbook case in matters of international regulation on the circulation of audiovisual services*

While the channel broadcasts since 2000 via satellite, the association of Al-Manar with Hezbollah and the recurrent references inciting to racial hatred and anti-Semitism in the channels' programmes have caused problems to the channel on the international level including its banning in many countries: the United States (2004), France (2004), the Netherlands (2005), Spain (2005), Germany (2008) are a textbook case in matters of international regulation on the circulation of television services.<sup>4</sup>

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<sup>1</sup> <http://www.manartv.com.lb>

<sup>2</sup> <http://www.almanar.com.lb/aboutus.php>

<sup>3</sup> Jamil Abou Assi, *Les médias libanais : entre professionnalisme et recherche de crédibilité : Médias communautaires et liberté de la presse: le communautarisme comme menace pour la liberté d'expression*, op.cit.

<sup>4</sup> For a detailed comparative analysis, see B. SAUIL and D. JOYCE, *International Approaches to the regulation of Al-Manar Television and terrorism related content*, Research report commissioned by the Australian Communication and Media Authority, Commonwealth of Australia, Sidney, 2011, [http://www.acma.gov.au/webwr/assets/main/lib310780/inDTTI\\_approaches-regulation-al-manar\\_tv\\_and-terrorism-related\\_content.pdf](http://www.acma.gov.au/webwr/assets/main/lib310780/inDTTI_approaches-regulation-al-manar_tv_and-terrorism-related_content.pdf)

After its studios had been bombed by Israeli aviation, on 13th July 2006, the channel organized a defensive strategy by broadcasting via Internet; at the beginning via a server based in India. But, using a government prerogative, the Indian government worried that it might compromise its recent nuclear contract with the United States, and disconnected the site in order to "*preserve good relationships with a friendly State*". Nevertheless the website resurfaced.

Bans on the retransmission of the television service via satellites are now being challenged via Internet broadcasting of the channel<sup>1</sup>. According to an article by the Middle East Media Research Institute, the channel uses servers mainly in the United Kingdom and The Netherlands<sup>2</sup>.

Applications allowing access to the channel have been removed from iTunes Store (Apple) and Google Play; and the Facebook page of the channel was shut down in August 2012.<sup>3</sup> Afterwards YouTube also prevented access to the channel, claiming complaints by third parties for copyright issues.<sup>4</sup> However another page which proposes music clips from the channel remains accessible on YouTube.<sup>5</sup> The signal of the channel is not accessible on various internet sites offering access to the *live* flow of television channels<sup>6</sup>, but is accessible on similar Arabic sites.<sup>7</sup> Extracts of programmes of the channel can be viewed on the website of the Middle East Media Research Institute, based in Washington.<sup>8</sup>

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<sup>1</sup> <http://www.almanar.com.lb/manarlive.php>

<sup>2</sup> S. STALINSKY, "Al-Manar TV, Banned by The U.S. and U.K., now Hosted on U.K. and Netherlands Servers", MEMRI, Washington, 8<sup>th</sup> November 2012. <http://www.memri.org/report/en/0/0/0/0/0/6797.htm>

<sup>3</sup> E. GATTEN, "Facebook deletes Hezbollah, Al-Manar TV pages for 'inciting violence'", The Daily Star Lebanon, 17 August 2012. <http://www.dailystar.com.lb/News/Local-News/2012/Aug-17/184907-facebook-deletes-hezbollah-al-manar-tv-pages-for-inciting-violence.ashx#ixzz2J0fcyhyu>; "Today, Facebook Removes Hezbollah Pages – Following MEMRI Series On Hizbullah Facebook Activity", MEMRI, 17 October 2012, <http://www.memri.org/report/en/0/0/0/0/0/6755.htm>

<sup>4</sup> <http://www.youtube.com/user/AlManarTube?feature=watch>, consulted on 23 January 2013.

<sup>5</sup> <http://www.youtube.com/user/sayednasrallah1/featured> Consulted on 23 January 2013.

<sup>6</sup> For example WWITV (based in the Netherlands), [http://wwitv.com/tv\\_channels/7668.htm](http://wwitv.com/tv_channels/7668.htm); Free TV (non-identifiable country of establishment): [http://www.freetv.com/modules.php?name=video\\_stream&page=watch&id=375](http://www.freetv.com/modules.php?name=video_stream&page=watch&id=375); Consulted on 26 January 2013

<sup>7</sup> For example arabic-media.com (non-identifiable country of establishment): <http://arabic-media.com/station/lebanon/manartv.htm> Consulted on 26 January 2013

<sup>8</sup> <http://www.memritv.org/subject/en/116.htm>



### 5.5.5 NBN: National Broadcasting Network<sup>1</sup>

It is owned by the chairman of the Lebanese Parliament, Nabih Berry<sup>2</sup>. Its main characteristic is its association with the 14<sup>th</sup> March opposition currents<sup>3</sup>. Founded in 1996, NBN is affiliated to the Amal party founded by Imam Moussa Sadr, who mysteriously disappeared in 1978 in Libya. The Lebanese State has always accused Libyan ex-leader, Mouammar Kadhafi, of being behind his disappearance.

Since the beginning of the popular revolt against the regime in Tripoli, on 17th February 2011, Lebanese satellite channels broadcasting on Arabsat as well as other Arabic channels, notably Al Jazeera, fell victim of scrambling coming from inside the Libyan territory. The Arabic operator, Arabsat, based in Saudi Arabia, provided them with new frequencies. Two days later, the Nilesat satellite is attacked too, leading to the complete stop of broadcasting of Lebanese channels, including NBN, in Libya. Like Arabsat, Nilesat allowed the Lebanese multi-channel unit to broadcast on another frequency, with the exception of NBN, "following a decision by the management", according to the Telecoms Regulation Authority (ART)<sup>4</sup>.

#### *Programming*

*"NBN remained a generalist channel up until 2002, at which date it transformed into a news channel broadcasting mainly news and documentaries. In 2007, the channel decided to change orientation again by diversifying its programmes: returning thus to a generalist classification with a focus on news", states Noha Darwich, head of programming at NBN<sup>5</sup>.*

Current programming of the channel includes news, talk shows, sports and religion. A cultural show is broadcast daily between 9.00 a.m. and 10.00 a.m. The three news programmes broadcast at 4.00 p.m., 7.00 p.m. and 10.00 p.m. are the background for the programming. *Tawaef Lebanon* (or Communities of Lebanon) and *Ahzab Lebanon* (or Parties of Lebanon) are amongst the most important programmes of the channels.

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<sup>1</sup> <http://www.nbn.com.lb/>

<sup>2</sup> The Chamber of Deputies of Lebanon re-elected the pro-Syrian leader Nabih Berry, in June 2009, as president for a fifth consecutive term (1992, 1996, 2000, 2005 and 2009). The presidency of the Chamber is traditionally assigned to a Shiite following the terms of the Lebanese National Pact. Nabih Berry is one of the main pro-Syrian figures in Lebanon.

<sup>3</sup> <http://www.mom.fr/guides/liban/liban006.htm>

<sup>4</sup> S.R., S.A., *Nilesat prevents the broadcasting of the Lebanese channel NBN in Libya*, Telecoms Regulation Authority (ART), 22/02/2011; <http://www.lecommercedulevant.com/node/18163>

<sup>5</sup> Interview with Noha Darwich, head of programming at NBN, during our data collection mission in Lebanon, October 2012



### 5.5.6 MTV Al Loubnaniya (Murr TV)<sup>1</sup>

Owned by Gabriel El-Murr, winner of the partial legislative elections of 2002 for the orthodox main town of the constituency of Metn (North), but whose victory was cancelled by administrative ruling which also ordered shutting down of the channel. It is only six years later that MTV was allowed by parliamentary amendment to broadcast again starting on 7th April 2009.<sup>2</sup>

#### *Beginnings*

MTV was created in 1991 as a generalist channel seeking to show the richness of Lebanese identity, creating a balanced mix of local Arab media, and western media content, focusing on replicating European and American programmes adapted to local and regional audience.

#### *Starting on the political scene*

In March 1995, MTV appeared on the political scene with local news and a number of political and socio-economic programmes.

MTV succeeded then to show a fervent commitment to act as the fourth power; by disclosing abuse of power and corruption. By defending public interest on the one hand, and diversifying its programmes on the other, MTV had, through the years, created an important audience in Lebanon. It served as the flagship of the silent majority and of civil society in combating Syrian dominance and preserving the values of authentic Lebanese features.

#### *Shutting down of MTV in 2002*

The shutting down of MTV, the main media of the anti-Syrian Christian opposition, as well as that of Radio Mount Lebanon (RML), caused a public outcry in Lebanon. Pursuant to article 68 of the electoral law of 1996, the Speedy Trial Tribunal of the Press Court ordered, on 4th September 2002, shutting down MTV and Radio Mount Lebanon; also owned by the Murr group.

These media had been sentenced for illicit electoral propaganda during the particularly stormy partial legislative elections, which had taken place in June 2002 in Metn (North of Beirut). MTV channel had also been sanctioned for having broadcast statements "harmful to the relationships with Syria and to the dignity of the Head of State Émile Lahoud"<sup>3</sup>. On 27th December 2002, the

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<sup>1</sup> <http://mtv.com.lb>

<sup>2</sup> Page "About MTV", <http://mtv.com.lb/AboutMtv>

<sup>3</sup> *Fermeture d'une télévision et d'une radio d'opposition*, Reporters Sans Frontières, 21 October 2002; <http://www.le-Lebanon.com/Lebanon/2002/10/21/la-censure-au-Lebanon/38/le-tribunal-des-imprimés-confirme-la-fermeture-d%E2%80%99une-t%C3%A9l%C3%A9vision-et-d%E2%80%99une-radio-d%E2%80%99opposition.html>. In its press release dated 5 September 2002, Reporters sans frontières was outraged by the violence with which the Lebanese patrol enforced the decision for shutting down MTV and Radio Mount Lebanon, recalling that article 68 was then applied for the first time. <http://www.rsf.org>

Press Court of Appeal in Lebanon confirmed the ruling of final closing of the private television channel MTV and Radio Mount Lebanon; both owned by the Gabriel Murr press group.<sup>1</sup>

After over six years of forced interruption, the channel resumed broadcasting on 7th April 2009. Since its reopening, MTV started a major revolution: a new look and new programmes, with a wide range of original ideas and famous shows adapted to Arab culture.

### **StudioVision**

All television productions by MTV are made in MTV StudioVision, a high level regional production centre with studios in Lebanon and Dubai. MTV is part of a group of well known Lebanese companies for audiovisual production:

- MTV
- Nostalgie
- NRJ
- Audiovision
- 2U2C
- Middle East Audio Suite
- Getforless
- Instruments Garage

The partnership between MTV and Studiovision allowed the channel to develop, through the years, an innovating programming based on entertainment shows.

Studiovision is today, one of the main audiovisual production houses in the Middle East, developing television programmes, TV series, films, music clips, TV ads and other materials from design to post production.

From its studios in Naccache in Lebanon to those in Dubai, Studiovision offers the best in production equipment in the six locations of the company. It has 20 studios, fully equipped and operational: control rooms, editing rooms, internal design construction allowing StudioVision to efficiently deal with the needs of any large scale production and to supply its clients with key solutions for the operation of all types of programmes<sup>2</sup>.

*With an annual budget which reaches 25 to 30 million USD (19 to 23 million EUR)<sup>3</sup>, MTV screen offered its viewers the most famous shows in Arabic adaptations, such as: The X Factor, Taratata, Talk of the Town, Family Feud, Chance of a Lifetime and Tout le monde est égal. MTV also bought the format rights for the reality television show Everybody Loves Raymond or (El Bab Fel Bab) from Sony Pictures Entertainment, and carried it over. The dynamics of MTV Studiovision production allowed the channel to total advertising revenues of 25 million USD i.e. 19 million EUR in 2012. MTV has 450 employees, including 250 in the news department. MTV and StudioVision staff totals 1300 employees<sup>4</sup>.*

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<sup>1</sup> *Fermeture confirmée de la chaîne de télévision MTV*, IFEX, 2 January 2003, [http://www.ifex.org/lebanon/2003/01/02/appeals\\_court\\_confirms\\_closure/fr/](http://www.ifex.org/lebanon/2003/01/02/appeals_court_confirms_closure/fr/)

<sup>2</sup> For more info on Studiovision see: <http://www.studiovision.tv/>

<sup>3</sup> Interview with Jean Tufenkji, Business Development Manager MTV, October 2012.

<sup>4</sup> Ibid.



### 5.5.7 OTV (Orange TV) <sup>1</sup>

**OTV** is a generalist television channel founded by the Free Patriotic Movement (CLP) of General Michel Aoun<sup>2</sup>. OTV started broadcasting on 20th July 2007. Its operation centre is located in Dekwaneh (Beirut). However, OTV can be viewed anywhere in the world by cable, satellite or Internet. General Aoun states that it is financed by shares purchased by resident Lebanese citizens and the Diaspora, and thanks to subscriptions (shares cost US\$10), but this cannot be verified.

Just like the General's speech, OTV based its editorial line on the fight against corruption and the yearning for a political system progressing towards a Third Republic which would be secular<sup>3</sup>. However, the alliance Aoun-Hezbollah made in 2006<sup>4</sup>, and which confused the data of the Lebanese political landscape, defines the media discourse of OTV which is more often than not a full attack against the Future Party<sup>5</sup>.

Amongst the famous programmes of OTV is *LOL*. It is a two-hour entertainment show, used to gather stars and comedians making jokes, around the host Hicham Haddad. It is the Lebanese version of the show "*Grosses Têtes*". The comedy show was subjected to a hostile media campaign launched through another local channel, New TV (Al Jadeed). In view of the record of audience figures for the show, New TV decided to counter-attack by trying to federate the conservatives, opposing this satirical approach<sup>6</sup>.

OTV offers a selection of programmes which include leisure and culture. It includes popular Lebanese programmes: *LOL*, *Ovrira*, *Paris je t'M*, etc...

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<sup>1</sup> <http://www.otv.com.lb/>

<sup>2</sup> After fifteen years in exile in France, General Aoun came back to Beirut on May 2005. In exchange for French protection, Aoun, who could not take part in any political activity, launched by proxy, in 1992, a political party, the Free Patriotic Movement. Known for its resistance during the Syrian occupation of Lebanon, the CPL changed objective since 2005. It fights against corruption, and works for the gradual establishment of the rule of law, secularism and transparency in Lebanon.

<sup>3</sup> Jamil Abou Assi, *Les médias libanais : entre professionnalisme et recherche de crédibilité*, op.cit.,.

<sup>4</sup> Paul Khalifeh, *L'alliance Aoun-Hezbollah brouille les cartes*, RFI, 12/02/2006, [http://www.rfi.fr/actufr/articles/074/article\\_41840.asp](http://www.rfi.fr/actufr/articles/074/article_41840.asp)

<sup>5</sup> In his article mentioned above, Abou Assi highlights the following, regarding the editorial neutrality of OTV's media discourse: "*regarding the notion of secularism, it was quickly diluted in the logic of confrontation between the General and his Christian opposition (notably the Lebanese Forces), regarding amongst other things, the defence of the interests of the Christians of Lebanon and the East. It should be noted that we see on this channel, as well as on other press organs of the CPL, a tendency for virulent criticism of the head of the Progressive Socialist Party, Walid Jomblatt, notably on his political strategy which is deemed to be too pro-western as well as on the management of the issue of the displaced people of the civil war*".

<sup>6</sup> *Islamists call for the shutting down of the « LOL » comedy show : the Media National Council will decide on Monday*, the Movement for Lebanon Representing the Free Patriotic Movement in Belgium, 10/01/2010, accessible at <https://mplBelgium.wordpress.com/tag/ghada-eid/>



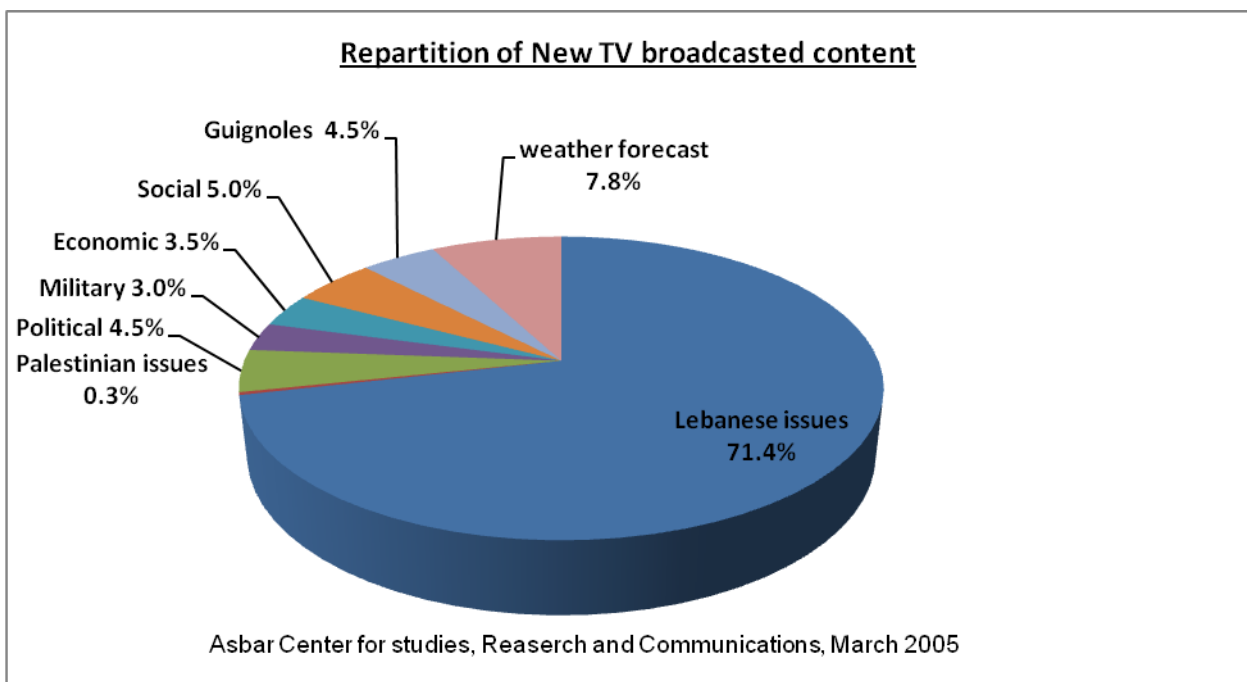


### 5.5.8 Al Jadeed TV<sup>1</sup>

Founded in October 2001, *Al Jadeed* television or *New TV* is the only private Lebanese channel which has never belonged to a political leader. It is owned by the famous Lebanese businessman Tahsin Khayat.

It follows communist allegiance and widely criticized the liberal choices of former Prime Minister Rafiq Hariri. Since the political crisis of 2004, it has been supporting the opposition while criticizing it sometimes. But its communist and pan-Arab ideology brings it closer to the opposition than to the majority. This relative neutrality has nevertheless not allowed New TV to stand out from other community channels. According to certain observers, it contributed, with its sharp criticism, to the media division which will later have a share of responsibility in triggering the tragic event of 7th May 2008<sup>2</sup>.

The only study which assessed media content according to a statistical methodology is the one carried out by the ASBAR media centre and which deals with New TV programming. Although it dates back to 2005, the study provides information on the distribution of the channels' programmes. The study says that 71.4% of content broadcast by New TV deals with Lebanese issues. The chart below shows the distribution of content on New TV<sup>3</sup>.



<sup>1</sup> <http://www.aljadeed.tv/>

<sup>2</sup> Jamil Abou Assi, op.cit.

<sup>3</sup> Dr. Fahd El Orabi El Harthy, *Study of the Lebanese channel New TV*, Asbar Centre for Studies, Research and Communications, March 2005, Riyadh; <http://www.asbar.com/ar/media-studies-consultancy/38.new-tv-lebanese-channel-study.htm>



The programming of New TV includes news, talk-shows socio-political shows and entertainment shows. *Corruption* or *Alfassad*<sup>1</sup> is one of the main shows of the channel, showing all kinds of malpractice and corruption prevailing in the country.

*Le! Nashr* (or *To be published*) is another successful weekly programme. Based on a format of interview-reports, the programme looks at Lebanese and Arab social and artistic current events.

In November 2011, Banijay International, subsidiary of the French group Banijay Entertainment, sold its format "*Rendez-vous avec mon idole*" to the Lebanese channel Al Jadeed. 26 episodes of 60 minutes of this musical entertainment programme were produced locally by Studiovision to be aired in early 2012. This format had been created by Banijay Productions France for TF1<sup>2</sup>.

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<sup>1</sup> In June 2009, after the controversy on the revelation of threats by the deputy Michel Murr (14 March coalition) towards a Syrian-orthodox priest, a presenter of New TV Ghada Eid had accused the deputy from CPL Ibrahim Kanaan of electoral fraud. This show was quickly revealed as having been done on a political request, including fake witnesses. The lawsuit filed against the managers of the program had given justice to Deputy Kanaan and sent the two fake witnesses to jail, while a political interference by the Ministry of Justice had made it possible to save the presenter Ghada Eid from a legal sentence. See "*Islamists request the shutdown of the comedy program "LOL": the national media council will take a decision this Monday*" published by *jeunempl* on 10 January, 2010, [MPLBelgium.org](http://mplBelgium.org), <http://mplBelgium.wordpress.com/tag/emission/>

<sup>2</sup> Pascale Paoli-Lebailly, *Pan-Arab sale of a format by Banijay*, Rapid TV News France, 08/11/2011, accessible at: <http://fr.rapiddtvnews.com/sujets/informations-generales/1154-vente-pan-arabe-dun-format-de-banijay>



### 5.5.9 Al Mayadeen TV<sup>1</sup>

Latest newcomer to the Lebanese audiovisual landscape, the channel *Al Mayadeen* or “*The Squares*” chose its name in reference to the Arab revolutions. Launched on 11th June 2012, this new Pan-Arab news channel was created by Tunisian journalist Ghassen Ben Jeddou. The channel claims to be “independent” and aims to start a new line in Arab audiovisual environment.

The director of the channel Ghassan Ben Jeddou, is a former star from Al-Jazeera who had angrily left the news desk at the beginning of the Syrian revolt. At the time he felt that the channel was too partial in its coverage of the “Arab springs”, unreservedly supporting the diplomatic positions of Qatar<sup>2</sup>. This is how Al Mayadeen was born, with as its co-founder another former star who resigned from Al-Jazeera, Lebanese journalist Sami Kleib.

With a slogan of “reality as it is”, *“This channel (...) was created to interact with the scenes of the Arab revolutions and demonstrations, observe popular resistance to occupation; it represents political immunity in the face of hegemony”*, says Ghassen Ben Jeddo<sup>3</sup>.

With head-office in Beirut, offices in Tunis, Cairo, Ramallah, Al Qods, Damascus, London, Moscow, Washington, New-York, Teheran, and reporters all around the world, Al Mayadeen identifies itself as an ambitious news producer. It is rumoured that 500 employees have already been recruited. Having recruited famous Arab journalists, “Al Mayadeen” can also rely on an important recruit, who will certainly get people talking about it, the MP to the Commons and ardent defender of the Palestinian cause, English George Galloway. He presents the programme “*Kalima Horra*”, a programme which according to the Lebanese newspaper Al Akhbar, will be the spearhead of the channel<sup>4</sup>.

According to Selim El Meddeb, correspondent for France 24, *“it may be that Al-Mayadeen is not as independent as it claims to be. Political links might exist with Teheran and Damascus. The wife of the news Director, Sami Kleib, is no other than the communication advisor to Syrian president Bashar al-Assad. Omar Ibhais, an independent television producer in Beirut, told FRANCE 24 that he knows where the funds of the new channel come from thanks to internal*

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<sup>1</sup> <http://www.almayadeen.net/>

<sup>2</sup> Selim El Meddeb, *Al-Mayadeen, the anti-Al-Jazeera news channel*, France 24, 11/06/2012; <http://www.france24.com/fr/20120611-naissance-dal-mayadine-nouvelle-chaine-dinformations-pan-arab-syria-iran-revolution-arabe>

<sup>3</sup> Sarah Ben Hamadi, *Al Mayadeen, the new news channel of Ghassen Ben Jeddou*, 11 /06/2012, accessible at: <http://www.tekiano.com/medias/satellite/5498-al-mayadeen-la-nouvelle-chaine-dinformation-de-ghassen-ben-jeddou-.html>

<sup>4</sup> Ibid.

sources. "The channel Al-Mayadeen is the fruit of a partnership between the Iranians and Rami Makhlouf, cousin of president Bachar al-Assad", he explained. "The Iranians invested 5 million dollars, I believe and Rami Makhlouf 25 million"<sup>1</sup>. Suspicions of financing by Iran and Hezbollah are also raised by the correspondent of rapid TV News but are denied by Ghassen Ben Jeddou, who states that the channel is financed by "a rich Arab businessman".<sup>2</sup>



#### 5.5.10 Arab Woman TV (Heya TV)<sup>3</sup>

Launched in 2002, the Lebanese channel *Arab Woman TV* presents itself as channel for health, beauty and glamour<sup>4</sup>. There is no information on the producing company.<sup>5</sup>

The programming of the channel is rich with education programmes showing the skill of many operators giving advice to Arab women viewers. The channel's programmes cover a whole range of tastes and interests. It covers local events and social news. Public and international figures and social icons are permanent guests of the channel.

In October 2012, the channel launched in collaboration with the U.N. Information Centre in Beirut a programme "Her Excellency Ms. Minister" aimed at promoting the participation of women in political life.<sup>6</sup> On internet, the channel is accessible live on the aggregator site, tvonline-live.<sup>7</sup>

The channel also produces a Branded channel on Youtube<sup>8</sup> and a Facebook page.<sup>9</sup>

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<sup>1</sup> Selim El Meddeb, op.cit.

<sup>2</sup> R. HAWKES, "New Middle East satellite TV channel unveiled in Lebanon" Rapid TV News, 12 June 2012; <http://www.rapidtvnews.com/index.php/2012061222391/new-middle-east-satellite-tv-channel-unveiled-in-lebanon.html#ixzz2J5c7DuJG>

<sup>3</sup> <http://arabwomantv.com/>

<sup>4</sup> On Heya TV, see D. MATAR, "Heya TV: A Feminist Counter public for Arab Women?", [Comparative Studies of South Asia, Africa and the Middle East](#), Volume 27, Number 3, 2007, pp. 513-524, [http://130.102.44.246/login?auth=0&type=summary&url=/journals/comparative\\_studies\\_of\\_south\\_asia\\_africa\\_and\\_the\\_middle\\_east/v027/27.3matar.pdf](http://130.102.44.246/login?auth=0&type=summary&url=/journals/comparative_studies_of_south_asia_africa_and_the_middle_east/v027/27.3matar.pdf)

<sup>5</sup> On the website of the channel the link to the page "About us" is broken. Consulted on 23 January 2013

<sup>6</sup> The Daily Star Lebanon, 10 October 2012, <http://www.dailystar.com.lb/News/Local-News/2012/Oct-10/190813-un-and-arab-women-tv-launch-new-program.ashx#axzz2J0eXKHEu>

<sup>7</sup> <http://www.tvonline-live.com/par-pays/liban/arab-woman-tv-liveheya-tv-online/>

<sup>8</sup> <http://www.youtube.com/user/ArabWomanTV>

<sup>9</sup> <http://www.facebook.com/arabwomantv>



#### 5.5.11 M Melody

Melody Entertainment S.A.E is the first integrated media and entertainment centre in the MENA region which is totally aligned with new media.<sup>1</sup>

Melody covers nearly all the necessary functions to provide high quality and tailored entertainment and customized services for the region. Melody owns and manages the services supplied by many companies, such as Melody Entertainment SAE and its services; Hits, Arabia, Tunes, Drama & Melody Digital Media, Melody Film limited and its service; Melody Aflam, Melody Radio Holding and its services Melody FM, Melody Music Production & Distribution, Melody Artist Management, Melody Pictures, Propaganda Arabia & Propaganda Media.

In September 2010, Melody Entertainment announced the broadcasting of its channels in France in the “Lebanese Bouquet” and the “Arabia bouquet”, multi-channel units available on the SFR IPTV platform.

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<sup>1</sup> [http://mediame.com/news/media\\_business/melody\\_entertainment\\_joins\\_sfr\\_france](http://mediame.com/news/media_business/melody_entertainment_joins_sfr_france)

## 6. AUDIENCE MEASUREMENT OF TELEVISION CHANNELS

The project for Television Audience Measurement-TAM was launched in Lebanon in 1998 by the Survey Institute Ipsos MediaCT (a subsidiary specialized in media content analysis) with the aim of measuring audience for television channels on the entire territory.

Ipsos Lebanon carries out audience measurement for channels in Lebanon using people metre systems which are sophisticated equipment, connected to television sets, allowing permanent transmission of audiences' viewing. *"In all the Middle East area, at the moment, only Lebanon uses this method, more efficient and reliable than that based on asking individuals to measure audience, used in certain countries<sup>1</sup>"*, says Édouard Monin, chairman of Ipsos MediaCT Global.

Today, 626 Lebanese households are equipped with this system, with 1,350 people metre systems and nearly 2,500 individuals concerned. Projects are ongoing to further enlarge the sample because the larger it is, the better the trends of Lebanese society are represented. The players in the television sector (advertisers, television channels and advertising agencies) can thus better target their investments.

It was at the time of a dispute between two local Lebanese channels, that the survey institute Ipsos MediaCT(a subsidiary specialized in media content analysis) held a conference on 17th May 2012 in Beirut to clarify things to the public, but also to present its new invention, mediacell.

Mediacell is new software for audience measurement, which currently works in a small part of Lebanon. It is an application, which can be downloaded on all smartphones and which records nearby audio signals second by second.

In order to be able to measure audience for channels, *Eurodata TV Worldwide<sup>2</sup>*, in cooperation with AGB Stat, Ipsos laid a panorama of statistical data for television reception in Lebanon.

Characteristics of the 2011 panel			
Based on:	Period:	TV Distribution (% of TV households):	Analogue terrestrial transition:
Total individuals 4+	1 <sup>st</sup> Jan.- 31 <sup>st</sup> Dec.2011	Terrestrial: 1.1%	No
	Mon-Sun/ 03:00-26:59	Cable: 94.5% satellite duplication	Measurement of audience delayed
Size of universe:		Satellite: 16.1%	No
854,925 (3,912, 550 TV households)	Region: National	Digital combination: 19.2%	Measurement of audience of guests
Size of the panel:	Instrument used:	Source: <i>Establishment Survey 2011 - IPSOS</i>	No
2,464 (602 TV households)	People metre: (since 1999)	<i>based on 3,000 TV households</i>	Measurement of audience of DTT
		Main Telecom operators:	No
		Cable Vision, Eco Net (cable)	
Source: Eurodata TV Worldwide - One Television Year in the World 2012 issue AGB STAT IPSOS - All rights reserved			

<sup>1</sup> Marisol Rifai, *Ipsos Lebanon presents its newborn: mediacell*, L'Orient Le Jour, 18/05/2012; <http://www.lorientlejour.com/category/%C3%83%E2%80%B0conomie/article/759444/ipsos-liban-presente-son-niveau-ne%20-mediacell.html>

<sup>2</sup> Eurodata TV Worldwide – One Television Year in the World 2012 issue AGB STAT IPSOS. Eurodata TV Worldwide- One Television Year in the World issue TNS TV Panel Diary, Lebanon, 2012, Annual overview of TV consumption and audiovisual landscapes in more than 90 territories around the world.

Film and audiovisual data collection project

- Audience shares of main Lebanese and Arab channels 2011  
Ten best performances of channels (based on the whole day)

Pursuant to the agreements with Médiamétrie / Eurodata TV Worldwide we are not entitled to provide the data in their online electronic version. This data is available in print, and may be provided on request.

- Average Daily viewing time (per individual - in H: MM)

Pursuant to the agreements with Médiamétrie / Eurodata TV Worldwide we are not entitled to provide the data in their online electronic version. This data is available in print, and may be provided on request.

### **6.1 Table: Audience market shares of some Arab and Lebanese channels (2011)**

Pursuant to the agreements with Médiamétrie / Eurodata TV Worldwide we are not entitled to provide the data in their online electronic version. This data is available in print, and may be provided on request.

## **6.2 Ten best programmes in 2011**

Pursuant to the agreements with Médiamétrie / Eurodata TV Worldwide we are not entitled to provide the data in their online electronic version. This data is available in print, and may be provided on request.



## **Best Sports Programme in 2011**

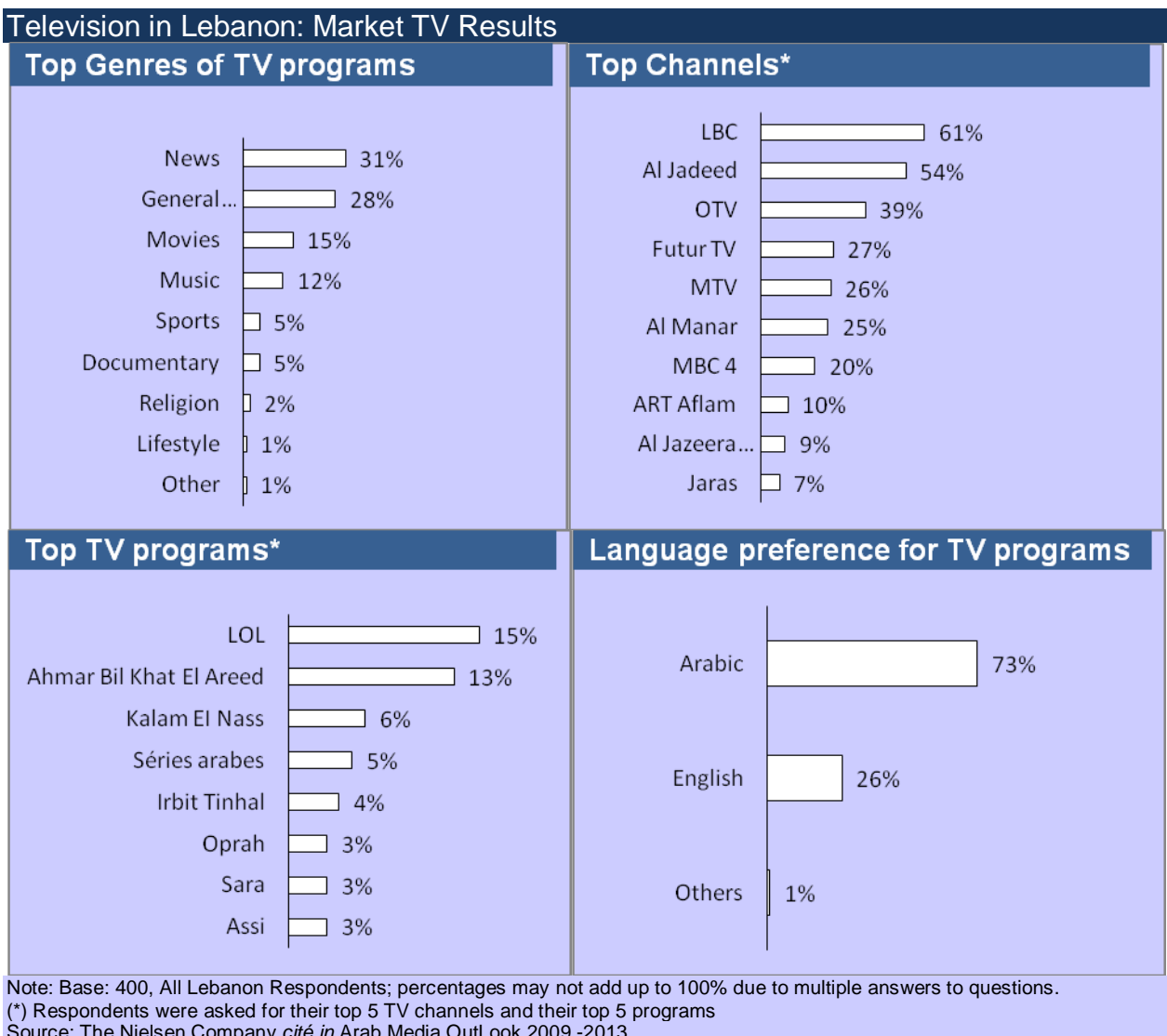
Pursuant to the agreements with Médiamétrie / Eurodata TV Worldwide we are not entitled to provide the data in their online electronic version. This data is available in print, and may be provided on request.

### 6.3 Market TV results

For its 3<sup>rd</sup> edition, *Arab Media Outlook 2009-2013*<sup>1</sup> published the results of a television market study in Lebanon completed by The Nielsen Company. Thanks to a questionnaire distributed to 400 Lebanese individuals, the study provided statements of television audience according to four indicators:

- Best types of TV programmes
- Best channels
- Best TV programmes
- Favourite language of TV programmes

Results indicate a rate of 31% of audience for news. LBC holds the first position for best channels with 61% followed by Al Jadeed with 54%. As for best programmes: the humoristic show LOL leads with a rate of 15% followed by the social-cultural programme Ahmar Bil Khat El Areed totalling 13%. Finally the favourite language indicator for TV programmes gives 73% to Arabic versus 26% for English.



<sup>1</sup> <http://www.fas.org/irp/eprint/arabmedia.pdf>

## 7. FUNDING OF THE AUDIOVISUAL SECTOR

### 7.1 The television advertising market

Lebanon has a clearly developed media landscape mainly in the sector of television and audiovisual production. It is also the location for some of the most popular satellite channels in the area and several regional production companies.

*Arab Media Outlook 2011-2015* emphasizes that television is the dominating advertising platform in Lebanon with a share of about 38% of the total value estimated at 144 million USD (110 million EUR) in 2011<sup>1</sup>. The report projects a progression of the television advertising market to reach a rate of 5% of the CAGR during the 2011- 2015 projection period and representing 66 million USD i.e. 50.4 million EUR<sup>2</sup> in 2015.

There are two television advertising sectors on the Lebanese market: terrestrial analogue (14% of TV households) and satellite (83% of TV households). Unlike other countries in the region, Lebanon records a relatively high rate of penetration for cable. However despite their spread, illegal cable connections show a weak penetration rate, i.e. 5%.

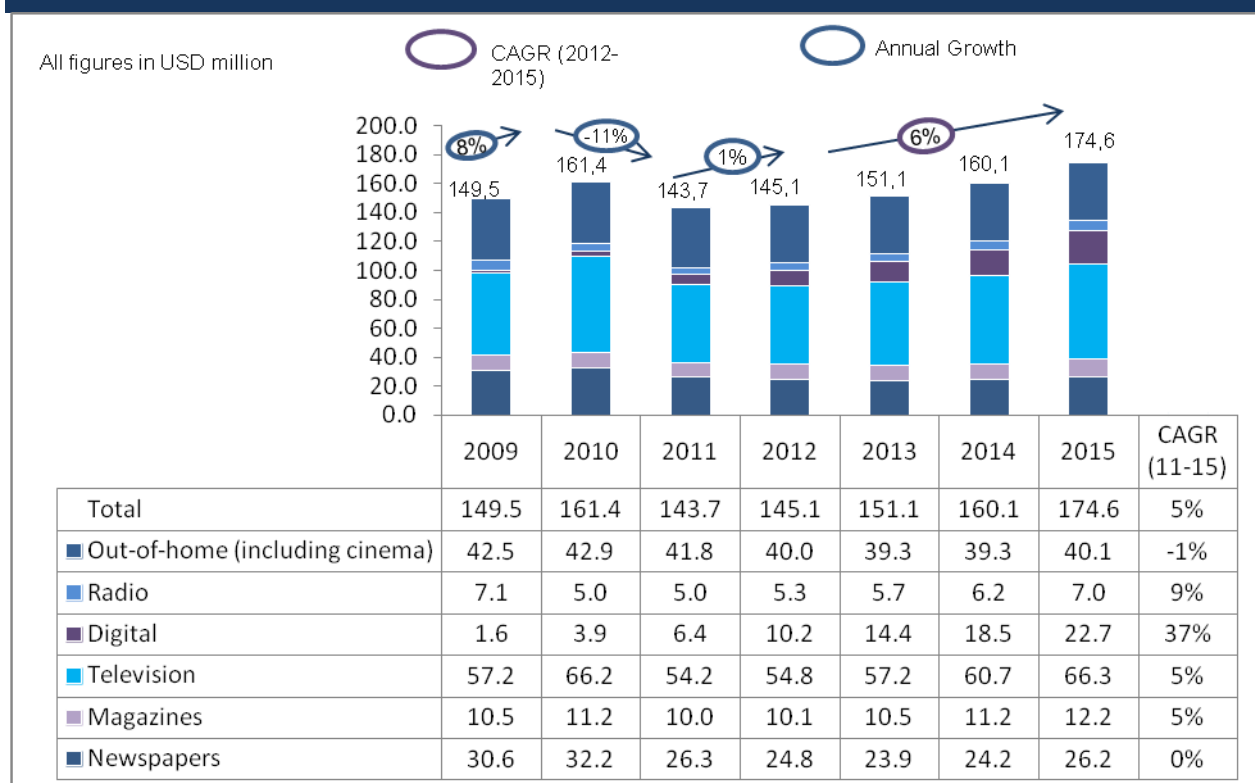
While the volume for the advertising market of local channels is estimated at about 50 million USD (38 million EUR) thus exceeding regional standards, it remains relatively weak taking into account the highly competitive nature of the market comprising many broadcasters. The decrease in advertising budgets in 2011 has strongly influenced small channels, many of which survived thanks to alternative financial resources, as a large number of Lebanese channels are supported by political parties.

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<sup>1</sup> *Arab Media Outlook 2011-2015* – Arab Media Exposure and Transition, Forecasts and analysis of Traditional and Digital Media in The Arab World, 4<sup>th</sup> edition, Dubai Press Club, UAE, 2012; <http://www.arabmediaforum.ae/userfiles/EnglishAMO.pdf>

<sup>2</sup> Conversion according to the exchange rate provided by Aonda currency converter as of 5<sup>th</sup> December 2012; <http://www.oanda.com/currency/converter/>

## Lebanon net advertising spend (2009-2015)



Source: Arab Media Outlook 2011-2015, p.190

### 7.2 Digital advertising

As with the rest of the region, share of digital advertising spend is relatively small and estimated at 4% of the total advertising spend of the Lebanese market in 2011. However, efforts made by the State to develop the digital sector are positive steps for the development of the digital advertising market.

The estimations of the *Arab Media Outlook* suggest a progression of the digital advertising market to reach 13% of total advertising spend in 2015, (in spite of the currently weak penetration of broadband networks). The progression will occur through the assimilation of mobile broadband, the intensive use of internet and the prosperous media sector in Lebanon.

### 7.3 Print media

Advertising spend for print media represent about 18% of total advertising spend in Lebanon. Newspaper advertising has decreased by 18% in 2011. *Media Outlook* projects a decrease of 6% in 2012, and a relatively flat growth during the rest of the projection period reaching 26 million USD (19.8 million EUR) in 2015.

The Lebanese press sector includes 17 dailies. *An-Nahar*, *Al-Balad* and *As-Safir* recorded the highest distribution rate during the past three years. Major advertisers in print media are banks, car industry, consumer goods and real-estate. As for the television market, most owners of newspapers in Lebanon have political affiliation. It is worth noting that in terms of freedom of press, Lebanon is relatively better off than its regional neighbours and ranks 93<sup>rd</sup> in the *Press*

*Freedom Index*<sup>1</sup>. Kuwait, standing at the 78<sup>th</sup> position, is the only Arab country to hold an advanced position in this ranking.

#### **7.4 Cinema and Out-of-home advertising**

Out-of-home and cinema advertising represent 29% of total advertising spend in Lebanon. Lebanon has the highest number of cinema screens per individual in the Arab region, standing just after the United Arab Emirates (UAE) (with 42 screens per individual).

Out-of-home advertising holds an important place in the Lebanese advertising market in comparison with other regional markets. This importance is due to a large inventory and less strict regulations. Banks, restaurants, real-estate and retailers are the main users of Out-of-home advertising. *Arab Media Outlook* projects a decrease in Out-of-home advertising reaching a rate of 1% of the CAGR and representing 40 million USD i.e. 30.5 million EUR in 2015.

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<sup>1</sup> *World Press Freedom Index 2012*, Reporters Without Borders For Freedom of Information, Paris, 25.01.2012; [http://en.rsf.org/IMG/CLASSEMENT\\_2012/CLASSEMENT\\_ANG.pdf](http://en.rsf.org/IMG/CLASSEMENT_2012/CLASSEMENT_ANG.pdf)

## 8. INTERNET TELEVISION AND ON-DEMAND AUDIOVISUAL SERVICES

### 8.1 Online VoD Service

LBC is one of the few broadcasters in the Middle East offering an Online VoD Service.

The website of the channel <http://www.lbcgroup.tv/watch/> offers free videos of news in streaming. A paying option is also available for VoD content, as well as the live distribution of entertainment programmes and television series. It also offers links to the most popular entertainment programmes of LBC.

The LBC video site offers varied subscription options: either a quarterly subscription for 30 USD (i.e. 22.9 EUR), or an annual one for 110 USD (84 EUR). Live television is offered at additional cost. Advertising and sponsoring are the two main sources of funding for the site<sup>1</sup>.

On the other hand, most Lebanese broadcasters offer forms of live streaming on their portal. MTV has invested in its digital platform <http://mtv.com.lb/> and launched MTV online and a free mobile application providing live streaming of the channel and news alerts with photos and videos, VoD and newspaper and television archives.

### 8.2 Video sharing websites

The development of broadband networks also represents an opportunity for video sharing platforms, financed through advertising.

In March 2011, Google Arabia announced the launching of geo-localised formulas in 8 Arab countries: Algeria, Egypt, Jordan, Morocco, Saudi Arabia, Tunisia and Yemen<sup>2</sup>.

Shortly afterwards, Google launched its geo-localised formula for Lebanon, the eleventh in the MENA region<sup>3</sup>. [Google.com.lb](http://google.com.lb) ensures searches in Arabic, French, English and Armenian.

On 30<sup>th</sup> April 2012, Google and YouTube in the Middle East and Africa announced the arrival of "Home Page ad" on YouTube. YouTube is the largest worldwide entertainment platform in the MENA region and offers an *ad space* on the home page. With over 6.2 million daily online imprints from Saudi Arabia, the United Arab Emirates, Egypt and Morocco and about 5.2 million daily mobile imprints, this would have an enormous impact on the level of *media planning*. On its blog, Google Arabia announced in October 2012 a programme aiming to "Arabize Internet" in collaboration with academia. In order to compensate the domination of English on Internet and the tendency of Arab Internet users to write in English, Google created a tool allowing the transcription of Arabazi (Arabic written in Latin characters) into conventional Arabic characters<sup>4</sup>.

### 8.3 Branded channels of Lebanese broadcasters on video sharing channels

As a complement to their own website, some Lebanese channels (just like a number of European channels) use possibilities offered by "branded channels" on video sharing platforms such as YouTube and Dailymotion.

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<sup>1</sup> *Arab Media Outlook 2009-2013*, Inspiring Local Content, Forecasts and analysis of Traditional and Digital Media in The Arab World, Dubai Press Club, UAE; <http://www.fas.org/irp/eprint/arabmedia.pdf>

<sup>2</sup> <http://thenextweb.com/me/2011/03/10/youtube-launches-localized-versions-for-mena/>

<sup>3</sup> <http://www.vip4soft.com/news/1338.html>

<sup>4</sup> Google Arabia blog, 5 December 2012; <http://google-arabia.blogspot.fr/>

They host video excerpts from programmes of some Lebanese channels. As of 5<sup>th</sup> December 2012, there were some 449,997 videos<sup>1</sup> from LBC, 467,165 videos<sup>2</sup> from Future TV and 100,733 videos<sup>3</sup> from OTV on Dailymotion.

In 2007, LBC Group created its own channel on YouTube. The online content of the LBCI television channel offers 6,136 videos from key programmes of the channel. As of 5<sup>th</sup> December 2012, over 15.1 million views have been recorded on the page of the channel and the number of subscribers was at 14,264<sup>4</sup>.

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<sup>1</sup> <http://www.dailymotion.com/relevance/search/future+tv+lebanon/1>

<sup>2</sup> <http://www.dailymotion.com/relevance/search/future+tv+lebanon/1>

<sup>3</sup> <http://www.dailymotion.com/relevance/search/otv+channel+lebanon/1>

<sup>4</sup> <http://www.youtube.com/user/lbcgroup/featured>

## 8.4 Audience of online video websites in Lebanon

In its report *ICT adoption and perspectives in the Arab States Region 2012*<sup>1</sup>, ITU provides a table of the 20 most visited websites in Lebanon in December 2011, elaborated by Alexa<sup>2</sup>.

### Rating of most visited websites in Lebanon, December 2011

Rank	Website	Users targeted	Default language of the site*	Description
1	Facebook.com	Worldwide	English	Online social network
2	google.com	Worldwide	English	World search engine
3	google.com.lb	Worldwide	Arabic	Search engine
4	youtube.com	Worldwide	English	Video sharing and distribution website
5	live.com	Worldwide	English	Email service website
6	yahoo.com	Worldwide	English	Various online services
7	wikipedia.org	Worldwide	English	Encyclopaedia
8	twitter.com	Worldwide	English	Online social network
9	tayyar.org	Local	Arabic	News website
10	elnashra.com	Local	Arabic	News website
11	msn.com	Worldwide	English	Various online services
12	blogspot.com	Worldwide	English	Online blogging service
13	lebanonfiles.com	Local	Arabic	News website
14	linkedin.com	Worldwide	English	Online professional social network
15	lebanese-forces.com	Local	Arabic	News website
16	elnashrafan.com	Local	Arabic	News website
17	alfa.com.lb	Local	English	Mobile telecommunication operator
18	nowlebanon.com	Local	English	News website
19	kataeb.org	Local	English	News website
20	mtctouch.com.lb	Local	English	Mobile telecommunication operator

Note:\* the default language is the language which appears first upon opening a website.

Source: Alexa.

The table below presents the two web portals most visited by internet users in Lebanon. As shown in this table, the adoption of online Arabic content is still behind compared to that of content offered by international actors such as Google, YouTube and Facebook. The local innovative portal is an online news website holding the ninth rank of websites most visited by

<sup>1</sup> ICT adoption and perspectives in the Arab States Region 2012, Summit : Connect the Arab world 2012, International Telecommunication Union (ITU); <http://www.itu.int/pub/D-IND-AR-2012>, p.91

<sup>2</sup> Alexa is a website (a subsidiary of Amazon inc.) which makes international rankings, and by country, on website visits. The level of reliability of these measures is subject to contestation by the experts in internet audience measurement as it rests on less developed methodology than the one used by paying services of audience measurement (of the kind proposed by Comscore, Nielsen, Médiamétrie). In the cases where sophisticated methods are not available, Alexa is however recognized as a useful indicator. For a mor exhaustive and updated ranking, See <http://www.alexa.com/topsites/countries/LB>



Lebanese internet users<sup>1</sup>. Out of these twenty websites, several contain an important volume of videos:

- social network video sharing websites: Facebook.com (US), Youtube.com (US), google.com.lb, (LB)
- News website tayyar.org (LB, with a mention of its owner the Free Patriotic Movement-CPL). This website is considered as a central source of news on Lebanon.
- News website nowlebanon.com in Arabic and English (private website without a mention of owner and taking donations).

The rating of the most popular 20 websites in January 2013 indicates slightly different results, and in particular it shows two pornographic video websites.<sup>2</sup>

<b>Rating of the 20 most popular sites in Lebanon (as of 25<sup>th</sup> January 2013)</b>	
<b>Site</b>	<b>Description</b>
Facebook	Social network
Google	Search engine
google.com.lb	Search engine
YouTube	Open platform for video distribution
Windows Live	Microsoft (Hotmail) messaging
Yahoo!	Portal
The Free Patriotic Movement	Free Patriotic movement portal (Party of General Aoun)
Twitter	Social micro blogging network
Wikipedia	Encyclopaedia
LinkedIn	Social Professional network
Blogspot.com	Blog host
lebanonfiles.com	elnashra.com Portal of the group El Murr

<sup>1</sup> <http://www.itu.int/pub/D-IND-AR-2012>, p. 90

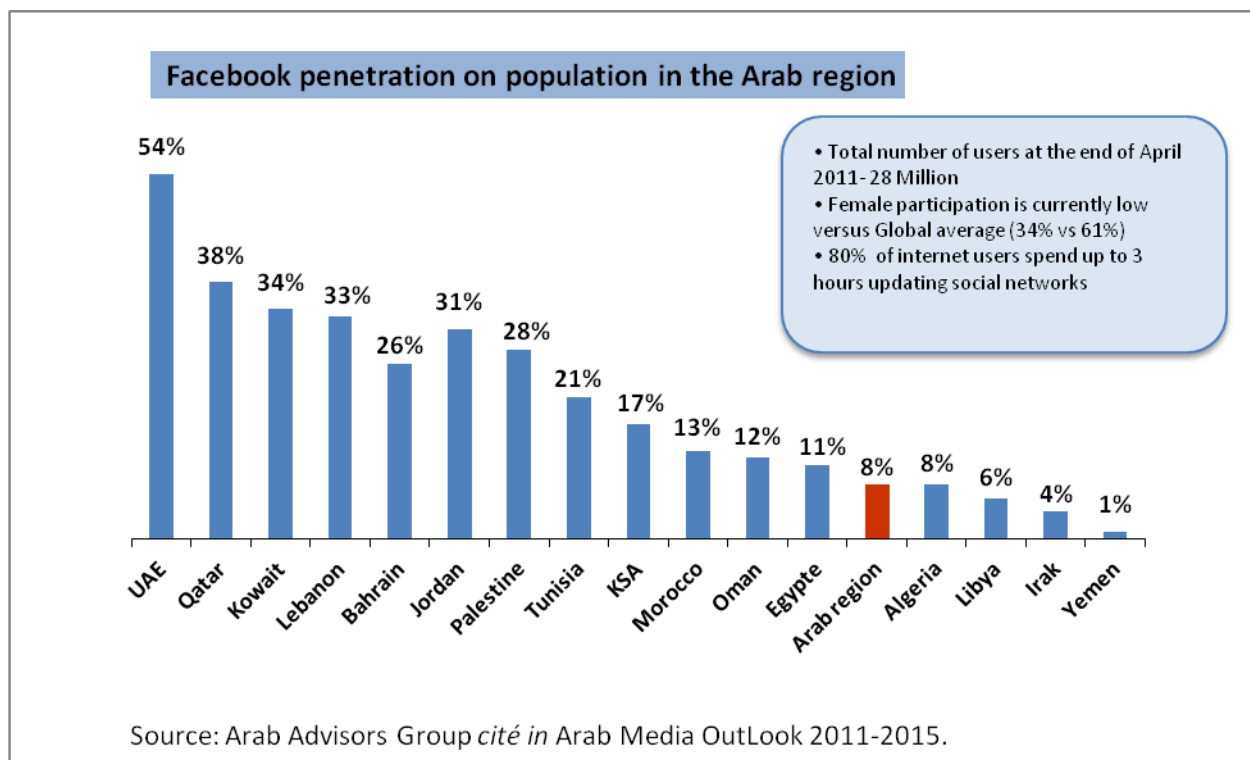
<sup>2</sup> <http://www.alexa.com/topsites/countries/LB>

MSN	Portal (Microsoft)
The Lebanese Forces	Official website of the Lebanese Armed Forces
XNXX Galleries	Pornographic video site (including child pornography programmes)
Amazon.com	E-commerce
Babylon	Website dedicated to teaching languages and translation questions
Microsoft Corporation	Microsoft website
xHamster's Free Porn Videos	Pornographic video website

Source: Alexa

According to *Arab Media OutLook*, while websites with local content and political news figure among the twenty best websites in the country<sup>1</sup>, Facebook is the most popular social website in Lebanon, with a penetration rate of 33%, followed by YouTube and Twitter.

The following chart shows the penetration rate of Facebook in relation to the population in countries of the Arab region. Holding the fourth rank, Lebanon is among countries with a high penetration rate for Facebook in the region.



<sup>1</sup> *Arab Media Outlook 2011-2015*, op.cit.

## 9. THE FILM MARKET

### 9.1 Historical overview

The Lebanese film industry started its activity in 1923 with the creation of the first movie theatre (Cristal). In 1929, the first Lebanese feature *The Adventures of Elias Mabrouk*, directed by Jordanno Pedutti (Italian origin), was released. After release of a second film, *The Adventures of Aboud Abed* (1931), Pedutti ended his career due to lack of funding.

**The years 1930-1960<sup>1</sup>:** Following independence in 1941, a film industry appeared in Lebanon built on the flagship model at the time in the region, the Egyptian film industry. Over twenty films per year were shot in the good years. These were comedies, romantic dramas, motivated by the desire to reach a mass audience. But seeking popular success does not go hand in hand with a real search for quality. This period was marked by many films often shot by Egyptian directors. The production at the time was often influenced by the Egyptian style and dialect. Still, two names came out distinctly, Ali El-Ariss who was the first Lebanese director and Georges Nasser whose film was selected for the Cannes Festival in 1957. In fact, after 1955, the new prosperity of the country which has become the financial centre of the Middle East allowed investment in infrastructures such as Cedar Studio, Haroun Haroun, Modern Studio and Baalbek Studio.

**The years 1963-1974:** This was the golden era for production in terms of volume but not quality. The nationalization of the film industry in Egypt by Gamal Abdel-Nasser caused a large number of producers, directors, actors and technicians to settle in Lebanon. This was a gain for the industry in Lebanon as several studios of sound, shooting and editing moved there. However, these productions, as a whole, remained deeply marked by Egyptian cinema. Even though most productions belonged to the action film category where the political context is only a pretext, a number of these films still played a role in the context of the Israeli Arab war. In parallel to this development, several independent cinema clubs were created in the universities of Beirut, and after 1970 there was even an amateur film festival.

**The years 1975-1991:** War started in Lebanon and generated a politically engaged cinema, but also caused a generation of trained and talented filmmakers to leave abroad. They created an exile cinema playing a role on the international scene, particularly in France: Maroun Baghdadi, Borhane Alaouie, Jocelyne Saab, Randa Chahhal, Jean-Claude Codsí, Leyla Assaf and others, not forgetting those who moved to the United States: Sylvio Thabet, Mario Kassar, Georges Chamchoum, Elie Samaha and others.

**Since 1991:** These are the years after the war. It is only by the mid 90s that the Lebanese film industry took a new turn with the appearance of new directors, freshly out of the universities and schools of Beirut, where cinema as a discipline started being recognized. Directors of this new generation were committed to working on images and creating their own films, which were really different in style from their elders'. These films were more personal, more "individual" as they reflected not only the concerns of their own authors, but also social, political, identity and future issues.

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<sup>1</sup> The distribution of the history of the Lebanese film industry according to periods mentioned below was completed by Mrs Aimée Boulos, founder and former chairwoman of the Foundation *Liban Cinéma* during the Regular Meeting of the Rotary Club of Beirut on 06/11/ 2006, *Le Bulletin*, Volume 76, No. 18 Rotary year 2006 – 2007, [www.rotaryd2450.org/.../RCB061106-18-Cinéma%20libanais.doc](http://www.rotaryd2450.org/.../RCB061106-18-Cinéma%20libanais.doc).

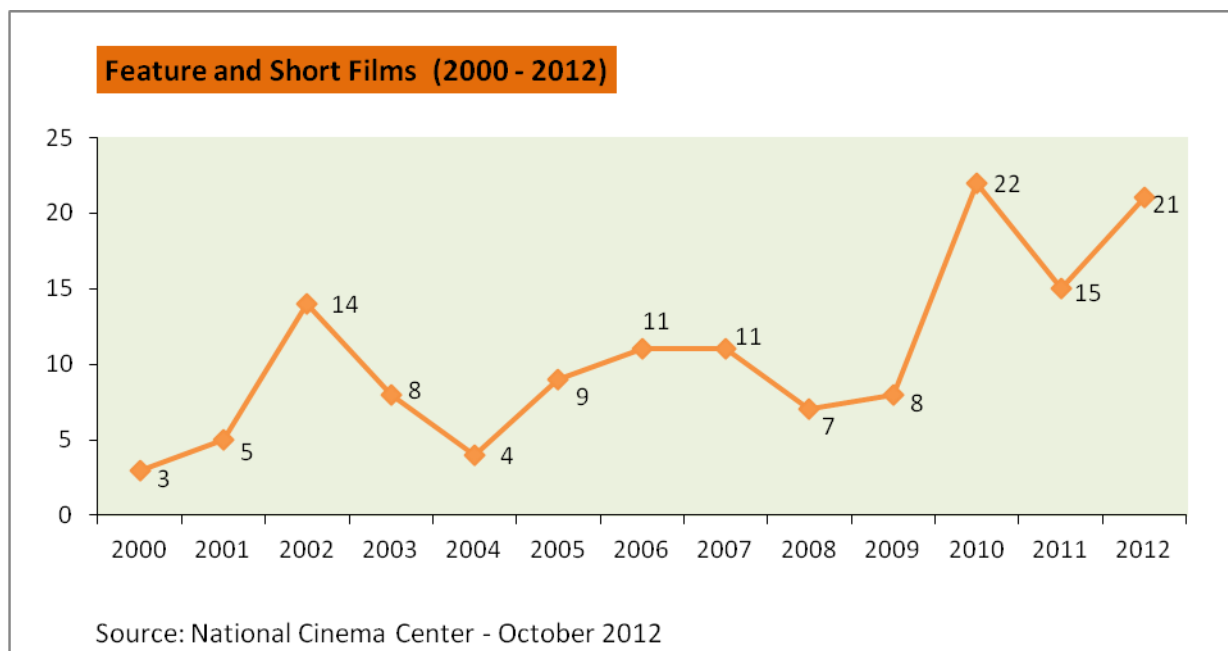
Regarding the Lebanese film industry, also see Y. ELIE, *Regards sur le cinéma libanais (1990-2010)*, L'Harmattan, Paris, 2012; L. KHAIB, *Lebanese Cinema: Imagining the Civil War and Beyond*, I.B. Tauris, London 2008.

However, in their professional life, Lebanese filmmakers faced a quite complex situation: "loneliness" at work in an indifferent environment and chaotic conditions, as the same conditions continued to prevail from the beginning of the film industry, and still hindered the establishment of a true film industry in Lebanon. We may list them as follows:

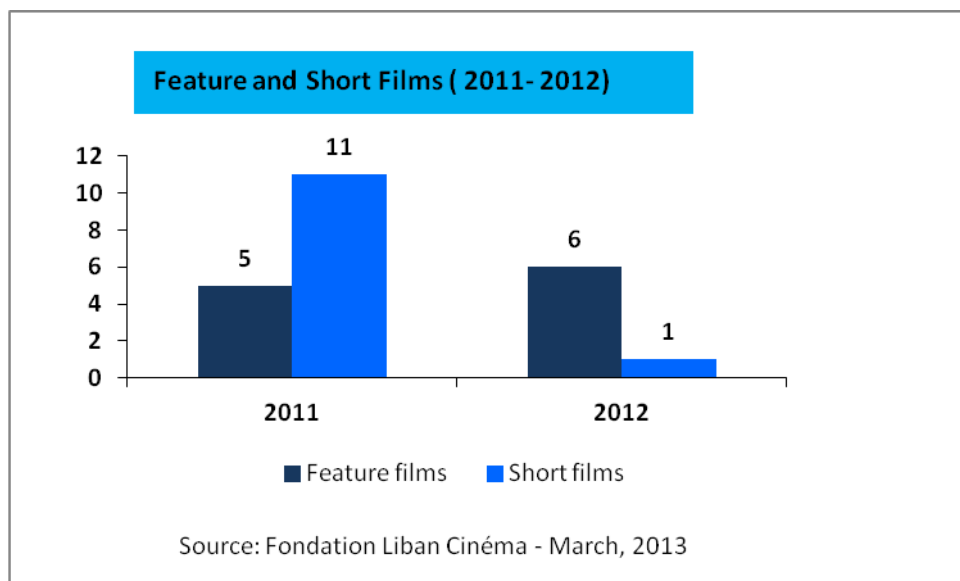
- Near absence of any film policy and any will by the State to dedicate the necessary funds for production, development and postproduction;
- In spite of the timid approaches made by the financial and banking sector via the bank of guarantees that supports some films, its awareness still remains to be raised so that private funds are created, as well as investment companies and special banks, and to encourage sponsorship;
- The small number of private support associations with a scope to motivate the public to watch films and visit more often movie theatres.

On the level of training, schools for audiovisual production and cinema are widespread in Lebanon, such as the Institute of Theatrical, Audiovisual and Film Studies of the University Saint-Joseph of Beirut (IESAV) and the Lebanese Fine Arts Academy (ALBA). However even if training thrives, and schools serve as a breeding ground, it should be agreed that it is hard for most to succeed as directors in Lebanon, given the difficulties of financing. Some rather choose the private sector. For example, Nadine Labaki, the famous director of *Caramel* and *Maintenant on va où ?*, first started as a director for advertising films and musical videos before meeting, by chance, a French producer, eight years after her award at the Biennale of Arab cinema.

However, despite these gaps, the Lebanese film industry is doing much better in 2012 than in the past. It manages to find ways of making a path thanks to the talents of these enthusiast and creative filmmakers, to the multiplication of production companies and to the development of multiplexes in the country.



In order to highlight the importance of a precise inventory of films produced annually, and despite the difference of data collected at the National Film Centre and the Foundation Liban Cinéma regarding the number of films produced in 2011 and 2012, we consider it important to expose in the following chart, the number of short films and feature films produced in 2011 and 2012, such as identified by the Foundation.



## 9.2 The National Cinema Centre (CNC)

The Film and Television Centre was created on 28<sup>th</sup> February 1964 by decree No.15666. The Inter-Arab Film and Television Centre was created on 2<sup>nd</sup> September 1964 by decree No.17369 and was linked to the Film Centre. These two centres merged in one which is the National Film Centre. The general framework of this merger appears in decree No.17473 of 9<sup>th</sup> September 1964<sup>1</sup>.

The National Cinema Centre was established within the Ministry of Information. This centre was the only official entity supporting a national film production.

The texts of the three above-mentioned decrees, established as follows the mission of CNC:

- Encourage the production of Lebanese feature and television films and contribute to improve their quality.
- Propose all necessary measures for the improvement of the film industry in Lebanon.
- Establish official contacts with all Lebanese and foreign, public and private bodies involved with the film industry.
- Work in collaboration with Arab countries in order to improve the level of Arab film production and promote it abroad.
- Provide to the Ministry of Information all information related to cinema in Lebanon from the legal, industrial, financial, technical, artistic political and moral point of view.
- Recommend the appointing of official representatives for Lebanon at international film festivals.
- Supervise from the technical and artistic point of view feature and television films produced by the Ministry of Information.

<sup>1</sup> The texts of decrees mentioned were provided by Mr. Hares Bassil, Curator of the Film Archives, Head of the Cinematheque, during our data collection mission in Lebanon (October 2012). He is also in charge of supervising and developing of the Cinema Department,

### 9.3 The Ministry of culture and cinema

In 1983, a new law created the Directorate for Cinema, Theatre and Exhibitions, and the CNC became a department under this Directorate.

In 1993, and pursuant to Law No.215, the Directorate for Cinema, Theatre and Exhibitions was transferred from the Ministry of Information to the Ministry of culture<sup>1</sup> which adopted a more or less efficient government policy to support the promotion, distribution and production of Lebanese films.

In 2000, a cinematheque was established within the Directorate by the Curator of the Film Archives and Head of the Cinematheque, Mr. Hares Bassil, also in charge of supervising and developing the Cinema Department. It is to be noted that the weak budget dedicated to this institutional entity does not allow it to benefit from the necessary logistical means for a developed cinematheque.

In 2008, a new law was enacted for the reorganization of the Ministry of culture. A new structure transformed the Directorate for Cinema into a Directorate for Knowledge Economy and Cultural Industries<sup>2</sup> where the Cinema Department became the Directorate for Cinema and Cinematheque. However, the organization chart is still under preparation (a project still under progress) while still using titles and attributions of the former directorate.

In parallel, the Ministry of Culture established a National Film Commission. This Commission is in charge of the distribution of financial support to filmmakers. The total budget dedicated by the Ministry to the financial support granted to filmmakers (in the form of subsidies) is of 100,000 USD (77,000 EUR) distributed among 10 to 15 filmmakers (short and feature films). According to the head of development in the Cinema Department, "*Indeed, this subsidy is very modest, but from the institutional point of view, it is a simple form of support especially for young filmmakers looking for financial means to produce their films*"<sup>3</sup>.

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<sup>1</sup> <http://www.culture.gov.lb/>

<sup>2</sup> <http://www.culture.gov.lb/ministere/index.php?sect=5&subject=1&subsubject=2>

<sup>3</sup> Statements collected during our interview with Mr. Hares Bassil Curator of the Film Archives, in charge of the Cinematheque and in charge of supervising and developing the Cinema Department, during our data collection mission in Lebanon (October 2012).



#### 9.4 Foundation Liban Cinéma

There is in Lebanon a private foundation, Liban Cinéma, created in February 2003, and supported by the Lebanese Ministry of Culture and the Minister at the time, Ghassan Salame. The creation of this organization shows a true institutional will to support, develop and promote the local film industry, even through a private system.

Liban Cinéma is a private non-profit association which aims to contribute in promoting film industry in Lebanon with support to training, creativeness, production and film promotion at the national and international levels.

The purpose is to put in place a local film industry likely to establish a strong image of Lebanon today. FLC seeks to play a federating role with different actors of this sector and secured the necessary means for this purpose by channelling energies and centralizing information. It also provides an opportunity for exchange between artistic, cultural and economic partners.

##### ***Role and objectives***<sup>1</sup>

- With the purpose of promoting Lebanese cinema, FLC takes part in regional and international festivals as well as the various film markets.
- FLC works for the protection of the Lebanese film heritage through the restoration and digital transfer of old Lebanese feature films and Archives of Télé-Liban.
- FLC takes part in the continued training of filmmakers by organizing seminars and workshops.
- FLC improves the development of film production by organizing pitching sessions, by offering awards and subsidies, and by creating opportunities for funding of films.
- FLC promotes Lebanon as a film destination and a regional production and postproduction centre in order to develop film industry in Lebanon.
- FLC works on the creation of a Fund for financing the development, production and distribution of films.
- FLC prepares a database for the Lebanese audiovisual landscape and Lebanese operators of the Diaspora.

##### *Actions taken to preserve Archives of films*

##### *FLC Initiative: restoration of Archives of Télé-Liban*<sup>2</sup>

The project aims to protect national political, cultural and sport memories from 1960 to 1980, period during which the single public broadcaster, Télé-Liban, used to monopolize the

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<sup>1</sup> [www.fondationlibancinema.org](http://www.fondationlibancinema.org)

<sup>2</sup> Foundation Liban Cinéma, Cinema Guide 2012.

audiovisual memory of the country. The plan consists in establishing an inventory of films, then selecting those requiring restoration following an order of priority and degree of deterioration, restoring them and digitizing them so that the public may access these treasures.

The Foundation Liban Cinéma seeks funds for this project from public and private institutions, international or non-government organizations. FLC manages the different aspects of the restoration process and works on raising awareness of the public in relation to the importance of the preservation of archives.

#### *Initiative of UMAM: the studio Baalbek<sup>1</sup> project*

The idea of creating the Lebanese non-government organization UMAM for Documentation and Research (UMAM D&R) derived from the belief that the recent past of Lebanon will only be accepted through collecting, protecting and distributing all elements of the past, documents and audiovisual archives included.

Studio Baalbek project aims to protect, restore and digitize the forgotten studio and the discarded rolls of film from Lebanese civil war until UMAM D&R was created to save this cultural and film heritage.

More concretely, this initiative seeks to identify and digitize these documents or at least to maintain their historic value. Once restored, the films undergo a long and delicate digitization process which will succeed provided some facilities are available especially in terms of the necessary equipment for reading audio and audiovisual formats.

## **9.5 The Ministry of tourism and cinema**

During the past seven years, the Tourism Board for Lebanon<sup>2</sup> in Paris, in coordination with the Lebanese Ministry of Tourism<sup>3</sup> worked on conveying positive information about Lebanon through a new media: films.

Films are an exceptional promotion tool for Lebanon as a tourist destination and also as a host country for filming, thanks to the diversity of panorama offered by the geography of the country.

After taking part in the film market of the Film Festival at Cannes for five years, the Tourism Board for Lebanon in Paris decided to make its contribution to the Lebanese film industry official, through a long-term project: 35mm from Beirut. Launched during the Cannes Festival in 2009, the project '35mm from Beirut' materialised its approach through a professional guide, distributed in the form of a flash drive, and a website to promote the image of the country as a host country for cinema. This activity was welcomed by operators during the festival, and led to many interesting discussions, and contacts were established between directors, producers and operators of the film industry.

Presently, '35mm from Beirut' wishes to extend its mission, in other words, to continue identifying the needs of the Lebanese film industry in order to organize the sector and its relations to the rest of the world by creating concrete actions. Among these actions: regularly updating the website [www.35mmfrombeirut.com](http://www.35mmfrombeirut.com), participating actively in the film market of Cannes Festival and organizing tours in Lebanon to professionals of foreign cinema.

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<sup>1</sup> Ibid.

<sup>2</sup> <http://www.destinationliban.com/>

<sup>3</sup> <http://www.lebanon-tourism.gov.lb/fr/>



## 9.6 National film events

### 9.6.1 Festivals and Associations



#### ***Beirut International Film Festival<sup>1</sup>***

BIFF is the oldest Lebanese festival and the only international film festival in Lebanon organizing a competition.

In 2012, the International Film Festival of Beirut was at its 16<sup>th</sup> year and 12<sup>th</sup> edition. Some editions of the festival did not take place because of the political situation.

The work of the Festival is provided by the following sections:

- *Middle Eastern Film Competition* for feature and short films and documentaries of the Middle East including North Africa, Turkey and Iran
- *Panorama* for films from all over the world
- The cooking section
- The children's films section.



#### ***Beirut DC<sup>2</sup> Association***

Beirut DC was founded in 1999 by a group of operators from the film industry and artists. The objective of the association is to offer necessary assistance and support to independent Arab filmmakers to overcome difficulties and constraints.

In order to promote the Arab film industry, BDC organized the *Ayam Beirut Al Cinema'iya* festival or *Film days of Beirut*. BDC regularly organizes training workshops for amateurs and semi-professionals in order to reinforce professions in the sector in the Arab world.

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<sup>1</sup> <http://www.beirutfilmfoundation.org/>

<sup>2</sup> <http://www.beirutdc.org/>



### **Beirut Film Festival (Film days of Beirut /Ayam Beirut Al Cinema'iya)<sup>1</sup>**

The Beirut film festival is held every two years since 2001 by Beirut DC. The objective of the festival is to reinforce openness to the Arab world and to create opportunity to Arab filmmakers to meet and exchange ideas.

The selection of films participating in the festival includes feature and short films, fiction and documentaries as well as experimental, animation and students' films, retrospectives and children's films.

Several parallel activities take place during the festival: training workshops, courses conducted by Arab and foreign experts, presentations and platforms.



### **Cabriolet Film Festival**

Cabriolet Film Festival<sup>2</sup> is the first outdoor festival in Lebanon. It was created in 2009 by Laboratoire d'Art. It presents local and international short films during three nights at Saint Nicolas Stairs at Gemmayzeh. In 2012, the festival held its fourth edition under the theme "Beyond Borders".

<sup>1</sup> <http://35mmfrombeirut.com/festivals/ayyam-beirut-al-cinema2iya/>

<sup>2</sup> <http://www.cabrioletfilmfestival.com/index.php>



## **DOCUDAYS**

### ***Beirut International Documentary Festival<sup>1</sup>***

The festival was created in 1999 in order to raise public awareness to non-fictional film genre as an entertainment and information tool. Docudays has become an expected film event offering, every two years, an exceptional date to film industry operators and the public. The 11<sup>th</sup> edition of Docudays will be held in 2013.



### ***Nadi Lekol EL Nass or Club for Everyone***

Nadi lekol El Nas<sup>2</sup> is a non-profit cultural league aiming to spread cultural media and tools. It was founded in 1998 and holds film screenings, exhibitions, literary seminars and music concerts.

Nadi lekol El Nass also supports local and Arab production through screening and distribution of cinema and literary works. In addition, the association stores and protects artistic and popular heritage by publishing and distributing in the form of books and DVDs. The 10<sup>th</sup> Nadi Lekol El Nas film festival took place on 13<sup>th</sup> May 2012 at the Al-Madina theatre.



### ***....Né in Beirut***

Né in Beirut started as an annual Lebanese film festival and was organized for the first time in August 2001<sup>3</sup>.

In 2003, producers and directors of Né in Beirut decided to create a production company with the same name in order to take part more actively in the recreation of the national Lebanese film industry and better support new talents. The company is also involved in international co-production with Europe, Canada and the United States.

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<sup>1</sup> <http://www.docudays.com/>

<sup>2</sup> <http://nadilekolnas.org/>

<sup>3</sup> <http://www.neabeyrouth.org/>

Né in Beirut actively works in order to discover and put in the limelight emerging talents in the sector and new film projects with international potential but dealing with local issues.



### ***Outbox International Short Film Festival***

Outbox International Short Film Festival<sup>1</sup> is an annual outdoor film festival of independent short films produced everywhere in the world. It also includes film exhibitions and organizes film soundtrack concerts.

The Outbox festival is held every year in June at the Roman baths archaeological site in downtown Beirut, where Romans, 2000 years ago, held their daily cultural events.



### ***Screen Institute Beirut***

Screen Institute Beirut<sup>2</sup> is a non-profit association which main objective is to reinforce the film industry infrastructure in the Arab region.

SIB offers particular support to documentary films. The Film Fund offers subsidies for the production and development of documentaries to filmmakers and producers from all Arab countries.

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<sup>1</sup> <http://www.outboxfilmfestival.com/>

<sup>2</sup> <http://www.screeninstitutebeirut.org/>



آفاق AFAC

### ***The Arab Fund for Arts and Culture***

Upon an initiative from the cultural field activists, the Arab Fund for Arts and Culture (AFAC)<sup>1</sup> was created in 2007. It is financed by individual sponsors and Arab and foreign institutions, and has an annual budget<sup>2</sup> of 2.5 million USD (1.5 million EUR).

The independent institution AFAC funds individuals and organizations operating in the fields of cinema, literature, music, performing arts, visual arts, research and training as well as regional events. AFAC also aims to facilitate exchange, research and cooperation in the cultural field between the Arab region and the rest of the world.

In the film industry field, AFAC regularly issues yearly regional calls to filmmakers so that they present their film projects. Moreover, AFAC has three programmes:

- *The Arab Programme for documentary Films (2009-2012)*. Since its launching, this programme has funded 47 documentary film projects.
- *AFAC Express* offering financial support to film and arts projects.
- *Crossroads*: initiative designed for financial support to independent Arab filmmakers. Until 2012 *Crossroads* managed to support and fund 12 film projects from different categories (feature and short films, documentaries and experimental film).



### ***The Metropolis Association for Lebanese Art***<sup>3</sup>

The Metropolis Association was founded in 2006 to develop a film culture in a country separating cultural policy from the public sector. Its main goal is to allow cultural diversity, establish dialogue through cinema by presenting its different tendencies and categories.

Metropolis develops the film heritage by presenting retrospectives and welcoming a film-loving audience in its facilities located in Ashrafieh at the heart of Beirut.

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<sup>1</sup> <http://arabculturefund.org/home/index.php>

<sup>2</sup> Interview with Rima Mismar, Film Programs Manager- AFAC. October 2012

<sup>3</sup> <http://www.metropoliscinema.net/>

## 9.7 Film production in Lebanon

The difficulties which hinder the Lebanese sector of film production are multiple: near absence of an institutional support system for film production, development and postproduction; difficulty to ensure funds, deterioration and/or closing of some regional markets because of the agitated political situation following the Arab spring, and a relatively restricted public.

However, the private sector for audiovisual and film production includes many production companies with strong impact on production in Lebanon.

The KFTV website lists providers for the production of films, television programmes and advertisements. The list of Lebanese companies provided by the site includes about fifty production and service companies<sup>1</sup>. We provide, in the following table, a list of the 30 main players in the market of audiovisual and film production in Lebanon, including 9 specializing in the production of documentaries.

### 9.7.1 Production companies in Lebanon (2012)

	Company	website
1	Wonderful Productions	<a href="http://www.wprod.tv/">http://www.wprod.tv/</a>
2	INTAJ	<a href="http://www.intaj.com">http://www.intaj.com</a>
3	Joy Films ME Beirut	<a href="http://www.joyfilmsme.com/ver2/">http://www.joyfilmsme.com/ver2/</a>
4	Cherry Films	<a href="http://www.cherryfilms.tv/">http://www.cherryfilms.tv/</a>
5	Independent Productions	<a href="http://www.independent-productions.com">http://www.independent-productions.com</a>
6	The Talkies	<a href="http://www.thetalkies.com/">http://www.thetalkies.com/</a>
7	Olive Tree Productions	<a href="http://www.olivetreeproductions.tv">http://www.olivetreeproductions.tv</a>
8	VIP Films	<a href="http://www.vipfilms.tv/">http://www.vipfilms.tv/</a>
9	Clandestino Films	<a href="http://clandestino-films.com/">http://clandestino-films.com/</a>
10	Dreambox Films	<a href="http://www.dreambox-films.com/">http://www.dreambox-films.com/</a>
11	Workshop Productions	<a href="http://www.workshop-productions.com/">http://www.workshop-productions.com/</a>
12	City Films	<a href="http://www.cityfilms-lb.com/">http://www.cityfilms-lb.com/</a>
13	Film Pudding	<a href="http://www.filmpudding.com/">http://www.filmpudding.com/</a>
14	ABL	<a href="http://abl.gr/">http://abl.gr/</a>
15	EFX Films	<a href="http://www.efxfilms.com/">http://www.efxfilms.com/</a>
16	Eyeshot Production	<a href="http://www.eyeshotme.com/">http://www.eyeshotme.com/</a>
17	Laser Films	<a href="http://www.laserfilms.com/">http://www.laserfilms.com/</a>
18	Maisonette Film Production	<a href="http://www.maisonetteproductions.com/">http://www.maisonetteproductions.com/</a>
19	Né.à Beyrouth Production	<a href="http://www.neabyrouth.org/">http://www.neabyrouth.org/</a>
20	Orjouane Productions	<a href="mailto:orjouaneproductions@gmail.com">orjouaneproductions@gmail.com</a>
21	Over Beirut Creative Boutique	<a href="mailto:iman.saadeh@overbeirut.com">iman.saadeh@overbeirut.com</a>
22	Revolution Film	<a href="http://www.revolution-film.com/">http://www.revolution-film.com/</a>
23	Signature Productions	<a href="http://www.signature-productions.com/">http://www.signature-productions.com/</a>
24	Studiovision	<a href="http://www.studiovision.tv/">http://www.studiovision.tv/</a>
25	Transworld Television Corporation	<a href="http://www.twtcorp.com/about.asp">http://www.twtcorp.com/about.asp</a>
26	Upside Down Production	<a href="http://www.upsidedownproduction.com/">http://www.upsidedownproduction.com/</a>

<sup>1</sup> <http://www.kftv.com/country/Lebanon>

27	Virtual Media Productions	<a href="http://www.virtualmediapro.tv/">http://www.virtualmediapro.tv/</a>
28	Walnut Productions	<a href="http://www.walnutproductions.com/">http://www.walnutproductions.com/</a>
29	Umam Productions	
30	About Productions	<a href="http://www.aboutproductions.com/index.php">http://www.aboutproductions.com/index.php</a>

Source: <http://www.kftv.com>, December 2012

One of the most productive and ambitious Lebanese production companies regionally and internationally is the ABOUT Productions Company. This is why we dedicate the following paragraphs to highlighting the company and its filmography.



Since 1998, date of its creation, the ABOUT Productions Company<sup>1</sup> produced feature films and documentaries and offered specific support to films expressing Lebanese voice and the identity of the region.

The company enabled emerging Lebanese talents to work with great names from the film industry: actors such as Catherine Deneuve and Patrick Chesnais (*Le Scaphandre et le papillon*, *Les enfants du siècle*); filmmakers like Jeanne Lapoirie (*Sous le sable*, *8 femmes*, *Les Roseaux sauvages*) and Julien Hirsch (*Lady Chatterley*, *Notre musique*, *Les Témoins*), as well as film editors such as Tina Baz Le Gal (*Blame it on Voltaire*).

Throughout the years, the company managed to establish a large network comprising artists, filmmakers and professionals from the Arab and Lebanese film industry. The company collaborates with European partners such as: Mille et Une Productions, Agat Films & Cie, Bizibi, mec Film and Six Island Productions, etc.

About Productions also benefits from support of several Arab and European institutional organizations. These include: CNC, ARTE France, France 2, the World Cinema Fund, the Hubert Bals Fund, the South Cinema Fund, the French Audiovisual Production Fund for the South (AIF and CIRTEF), and COFICUP 2.

Film funds supporting the ABOUT Productions Company include: Arcadi, the Doha Film Institute, the Dubai Film Market (ENJAAZ) and the Lebanese Ministry of Culture<sup>2</sup>.

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<sup>1</sup> <http://www.aboutproductions.com/index.php>

<sup>2</sup> Foundation Liban Cinéma- Cinema Guide 2012

## Filmography of ABOUT Productions

2012 *Lebanese Rocket Society* by Joana Hadjithomas and Khalil Joreige- documentary

2012 *Stable Unstable* by Mahmoud Hojeij- feature film

2011 *Gate #5* by Simon El Habre- feature documentary

2011 *Sector Zero* by Nadim Mishlawi- feature documentary

2010 *Stray Bullet*, by Georges Hachem- feature film

2010 *The Mountain*, by Ghassan Salhab- feature film

2010 *Yanoosak* by Elie Khalifeh- feature film

2009 *1958* by Ghassan Salhab- feature film

2008 *I want to see* by Joana Hadjithomas and Khalil Joreige- feature film

2007 *Melodrama Habibi* by Hani Tamba- feature film

2006 *The Last Man* by Ghassan Salhab- feature film

2005 *A Perfect Day* by Joana Hadjithomas and Khalil Joreige- feature film



## 9.8 Film distribution

### 9.8.1 Distribution companies

There are 15 authorized distribution companies in Lebanon, most of which with a head-office in Beirut. This list by Foundation Liban Cinéma includes the names and websites or available email addresses for these 15 films distribution companies operational in Lebanon. They are:

Distribution companies in Lebanon (2012)		
Company name	Head-office	Site or email address
<b>Empire circuit</b>	Beirut	<a href="http://www.circuit-empire.com/">http://www.circuit-empire.com/</a>
<b>Circuit Planète</b>	Beirut	<a href="mailto:fsf@cyberia.net.lb">fsf@cyberia.net.lb</a>
<b>Crystal Films</b>	Hamra	<a href="mailto:crystalf@cyberia.net.lb">crystalf@cyberia.net.lb</a>
<b>Italia Films (BVI)</b>	Beirut	<a href="mailto:hyam.saliby@italiafilm.com.lb">hyam.saliby@italiafilm.com.lb</a>
<b>Four Stars Films (UIP)</b>	Jounieh	<a href="mailto:pamela@4starfilms.com">pamela@4starfilms.com</a>
<b>Joseph Chacra &amp; Sons (WB)</b>	Beirut	<a href="mailto:jcsons@jcsons.com">jcsons@jcsons.com</a>
<b>Fathallah Co</b>	Beirut	<a href="mailto:info@mip-media.net">info@mip-media.net</a>
<b>MC distributions</b>	Achrafieh	<a href="http://www.metropoliscinema.net/2011/mc-distribution/">http://www.metropoliscinema.net/2011/mc-distribution/</a>
<b>Sabbah Media Corporation</b>	Beirut	<a href="http://www.sabbah.com">www.sabbah.com</a>
<b>Jaguar film</b>	Hamra	<a href="mailto:jaguarfilm1@hotmail.com">jaguarfilm1@hotmail.com</a>
<b>Taxi Films</b>	Beirut	<a href="mailto:rshamdan@cyberia.net.lb">rshamdan@cyberia.net.lb</a>
<b>Nour Productions</b>	Beirut	<a href="mailto:maijean@cyberia.net.lb">maijean@cyberia.net.lb</a>
<b>Cederland Film Company</b>	Hamra	<a href="mailto:mcfilm@cyberia.net.lb">mcfilm@cyberia.net.lb</a>
<b>Prime Pictures</b>	Baabda	<a href="mailto:beirut@primepic.com">beirut@primepic.com</a>
<b>On-Line Films</b>	Achrafieh	<a href="mailto:onlinebh@sodetel.net.lb">onlinebh@sodetel.net.lb</a>

Source: Foundation Liban Cinéma - October 2012

## 9.9 Georges Haddad Sons & Co (LFGH) / the Empire Group: an incumbent and major player in the Lebanese film landscape.

### 9.9.1 Background

Georges Haddad Sons & Co. was created in 1956 and is one of the main distributors in Lebanon. LFGH acts as the exclusive distributor for Columbia TriStar and Twentieth Century Fox films in Lebanon. It also distributes independent acquisitions managed by Empire Associate Jaguar Film International.

Throughout the years, Georges Haddad Sons & Co. (LFGH) succeeded to lead its films shown on screens to great success thanks to the dedication of an expert team working in three large departments:

- *Marketing Department*
- *Distribution Department*
- *Accounting Department*

### 9.9.2 Empire International



Empire International was created in 1998 to crown a long history of presence, success and skill in the Lebanese film market. The Empire Group entirely owned by the Haddad family distributes Columbia TriStar and Twentieth Century Fox films in Lebanon. Empire also distributes independent acquisitions handled by Jaguar Film International in the following countries: United Arab Emirates, Bahrain, Kuwait, Qatar, Oman, Syria, Jordan and Egypt. Empire is also present in the Gulf region under the banner name Empire International Gulf operating from offices in Dubai. In Egypt, Empire operates through the company *Allied Film Distributors (AFD)*.

Empire International Gulf and AFD run their operations in cooperation with the Beirut head-office, distributing films and providing them to theatre owners. The Group Empire organizes film events and draws on promotion and marketing operations to ensure its films are blockbusters.

In July 2011, Empire International signed an agreement with Imagenation Abu Dhabi for the distribution of films of this company in the MENA region.<sup>1</sup>

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<sup>1</sup> Abu Dhabi Press news, [http://www.abudhabicityinfo.com/News/pr\\_Imagenation\\_Abu\\_Dhabi\\_Signs\\_Deal\\_with\\_Empire\\_International\\_to.aspx](http://www.abudhabicityinfo.com/News/pr_Imagenation_Abu_Dhabi_Signs_Deal_with_Empire_International_to.aspx)

### 9.9.3 Georges Haddad Sons & Co - Empire: Overview and achievements

Year	Achievements
1919	The Lebanese cinema pioneer Georges N. Haddad launches his movie theatre in Beirut, named Cosmograph and located in Bourj (Place des Canons). Shortly afterwards, he partners with Nicolas Cattan and creates The Cattan & Haddad Association; a strategic alliance which will last 37 years.
1926	Empire begins its conquest. The joint-venture begins to flourish. Theatres spread throughout Lebanon and Syria and the name Empire first appears on the popular Rue Gouraud in Beirut. Five years later, this theatre is completely renovated and reopens with a capacity of 1200 seats and two balconies.
1930-1935	Within five years, the Cattan & Haddad expertise develops and materialises through the inauguration of 36 new facilities in large cities such as Beirut, Damascus, Aleppo, Tripoli, Sidon, Homs and Hama.
1954	Empire manages to release films simultaneously with New York, London and Paris.
1956	Dissolution of the Cattan-Haddad partnership and the torch is passed on to the sons of Haddad: Micheal and Mario. It leads to the birth of Georges Haddad Sons & Co., and opens the way for the film affiliation known as the Empire Theatres playing the same films in separate theatres in Beirut (Hamra, Bourj and Ashrafieh).
1958	The major American production studio United Artists grants Empire exclusive film distribution rights in Lebanon and Kuwait. The agreement ends in 1974, when United Artists is bought by MGM.
1964	Columbia Pictures closes its offices in Beirut and grants Empire exclusive distribution of its films released in the Middle East; a solid association marking the film industry in the Land of Cedars for 48 years.
1976	Undeterred by the civil war, Empire transforms the auditorium of Lebanon Casino into a luxury movie theatre. Movie lovers subjected to violence in Beirut seek refuge in the safety of Jounie where their passion for cinema continues.
1978	Empire inaugurates its first five-screen multiplex, the first of its kind in the Middle East and names it Espace Cinemas.
1982	Empire II and III Theatres open for Ashrafieh clients in the upscale Sophil Centre as a flagship for movie theatres of the Empire chain.
1986	Long negotiations between Empire and Columbia TriStar Home Entertainment lead to the creation of Top Ten mediastores. At the beginning, Top Ten mediastores start production and distribution of VHS tapes. With the development of technology, they shift to DVD production and distribution.
1988	Empire becomes the exclusive distributor for 20 <sup>th</sup> Century Fox in Lebanon and Gulf countries.
1996	Empire launches The Movie Guide, the first magazine of its kind in Lebanon covering film releases. Empire partners with Marriott International Hotels and inaugurates four screens in the strategic facility of Jnah. Before the end of the year, Empire inaugurates three theatres with a capacity of 1200 seats in the St. Elie shopping mall in the popular beach resort Las Salinas (Enfeh).
1997	Empire inaugurates in the most luxurious complex in the Middle East, The Dunes, three-state-of-the-art movie theatres, exquisitely designed by Maurizio Parenti and boasting the most advanced technologies available. Two years later, a fourth screen is added. By Christmas, Empire inaugurates six new screens at Empire Sodeco Square, which quickly becomes the favourite spot for cinema fans in the country.

1998	Empire International inaugurates its Gulf offices in Dubai, introducing first direct distribution of films from American production companies to local theatre owners.
1999	Six new state-of-the-art theatres are established in Mkalless.
2000	Empire inaugurates a five-screen complex in the Galaxy Mall shopping centre.
2001	Empire adds a sixth screen at Galaxy Mall reaching 1000 seats. In order to promote its distribution network in Egypt, Empire allies with Italia Films forming Allied Film Distributors (AFD). In Bahrain, Empire International signs a long-term management and booking agreement with the twelve-cinema Al Dana multiplex and inaugurates offices in Manama.
2003	Empire issues the first copy of its blockbuster magazine, the Movie guide, destined to Gulf audience.
2004	Empire inaugurates its first multiplex integrated in the ABC shopping centre.
2006	Cinemacity 9 Plex becomes Empire's jewel of the crown. Its association with Prime Pictures allowed it to exceed in terms of space and luxury all other cinema complexes in the Middle East. Cinemacity becomes the first movie theatre in Lebanon where films from the six major American production studios are screened.
2009	Over 50% of Empire screens are now equipped with digital technology. By 2012, Empire will complete setting 3D system in all theatres.
2010	Empire International releases three films which will break records in the Middle East: "My name is Khan", "2012" and "Avatar". The three films attract about two million viewers in the Middle East. In Lebanon, Cinemacity Empire beat all its records and registers 900,000 ticket sales in the year. Empire cinemas claim over 55% of the Lebanese market.
2011	The Empire Group engages in the operating of theatres abroad, investing 9 million dollars in 14 movie theatres in Erbil, the capital of Iraqi Kurdistan.

Source: Empire International; <http://www.circuit-empire.com/history.asp>

## 9.10 Management of movie theatres

### 9.10.1 Movie theatres in Lebanon

#### ➤ *Empire circuit*<sup>1</sup>

Empire circuit has been present in Lebanon since 1992. In 2010, it claimed over 55% of market shares in terms of admissions<sup>2</sup>. With 34 screens on Lebanese territory, it operates notably the largest multiplex of the country: Cinemacity at Citymall which alone hosted, according to figures from Empire, 909,109 viewers in 2010 reaching a rate of 35.67% of G.B.O of the same year<sup>3</sup>.

The expansion strategy of the Empire Group is notable in Lebanon and abroad. In September 2011, the group announced an investment of 4.5 million USD in Bekaa Valley to build a new multiplex for up to 1800 viewers<sup>4</sup>. Some months before, the group announced its involvement in the management of 14 movie theatres in Erbil the capital of the Iraqi Kurdistan<sup>5</sup>.

It is to be noted that all theatres in the Empire circuit are equipped with a digital system since December 2011.

Starting February 2012, all screens in the Circuit Planète theatres are digital including two 3D screens<sup>6</sup>. All Grand Cinemas theatres are also equipped with a digital system.

#### ➤ *Total movie theatres in Lebanon*

The following table lists all movie theatres operational in Lebanon including those of Empire Group, and provides the numbers of screens and seats by multiplex. In total, Lebanon includes 15 multiplexes, 94 screens and 16 499 seats.

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<sup>1</sup> <http://www.circuit-empire.com/>

<sup>2</sup> See P.S, *The Empire Group will manage 10 movie theatres in the Bekaa*, Le Commerce du Levant, 01/09/2011, <http://www.lecommercedulevant.com/node/19473>

<sup>3</sup> Theatrical Analysis- Lebanon 2010, period Dec. 31, 2009 - Dec.29, 2010, Empire; document provided during our data collection mission in Lebanon, October 2012.

<sup>4</sup> See P.S, *The Empire Group will manage 10 movie theatres in the Bekaa*, op.cit.

<sup>5</sup> See S.A, *The Empire Group will manage 14 movie theatres in Erbil, in Iraq*, Le Commerce du Levant, 07/03/2011, available at <http://www.lecommercedulevant.com/node/18298>

<sup>6</sup> Foundation Liban Cinéma, August 2012.

<b>Movie theatres in Lebanon (October 2012)</b>			
	<b>Cinemas</b>	<b>Number of screens per multiplex</b>	<b>Number of seats per multiplex</b>
1	CinemaCity	10	2 200
2	Grand ABC	7	1 090
3	Grand Concorde	8	1 733
4	Grand Saida	5	770
5	Grand ABC Dbayeh	8	1 040
6	Espace	5	1 099
7	Empire Dunes	5	1 022
8	Galaxy	6	1 036
9	Planète-Abraj	8	1 545
10	Grand Las Salinas	4	1 206
11	Stargate	5	855
12	Empire Sodeco	6	820
13	Planète-Tripoli	4	641
14	Empire Sofil	2	530
15	Cinemall	8	1 002
	<b>Total Empire</b>	<b>34</b>	<b>6 617</b>
	<b>Total Planète</b>	<b>15</b>	<b>2 186</b>
	<b>Total Grand</b>	<b>32</b>	<b>5 839</b>
	<b>Total other cinemas</b>	<b>5</b>	<b>855</b>
	<b>Total Cinemall</b>	<b>8</b>	<b>1 002</b>
	<b>Total MKT</b>	<b>94</b>	<b>16 499</b>

Source: Empire, October 2012

- **Number of admissions per week of projection in all Lebanon's theatres including those of Empire circuit from 1998 to 2011**

W	2011	2010	2009	2008	2007	2006	2005	2004	2003	2002	2001	2000	1999	1998	
1	71 265	77 274	67 585	55 549	39 244	124 209	47 852	55 116	48 504	51 984	66 808	102 452	48 370	64 423	1
2	51 244	54 150	36 486	38 629	32 027	72 477	46 364	37 938	53 284	53 953	55 337	66 781	107 700	62 587	1
3	43 065	58 896	40 220	38 194	30 748	52 845	81 582	45 096	54 481	61 819	48 510	53 970	57 550	79 703	1
4	33 305	58 852	40 616	23 302	29 226	56 783	50 875	101 415	50 930	56 708	48 086	51 644	55 148	90 039	1
5	39 637	55 109	36 713	29 251	38 883	46 458	49 728	61 454	90 620	56 395	53 864	68 168	72 104	72 550	1
6	53 485	61 671	45 859	31 084	58 937	54 962	44 020	37 937	65 136	55 127	53 395	54 485	57 930	90 738	1
7	58 252	54 481	38 478	29 766	64 219	44 510	35 824	48 388	45 391	55 400	44 846	52 008	61 330	112 391	1
8	52 704	50 743	49 891	34 558	65 990	38 162	37 779	50 453	61 967	89 468	45 242	53 376	55 731	89 935	1
9	59 300	51 886	47 371	31 590	64 993	54 616	43 533	41 197	57 359	48 467	82 348	56 077	60 795	92 015	1
10	60 403	50 819	56 080	28 462	56 570	49 257	34 207	36 311	53 931	49 113	53 607	68 746	47 024	75 805	1
11	46 847	40 402	38 920	31 328	41 898	41 099	25 446	119 794	40 624	52 715	40 382	62 310	58 661	79 636	1
12	39 407	37 094	30 974	46 120	52 517	44 389	19 893	88 907	42 184	67 343	45 279	43 357	98 174	81 622	1
13	44 557	44 419	32 166	42 168	89 252	43 766	16 909	82 085	36 426	70 839	52 153	38 730	86 417	119 362	1
14	39 809	52 478	29 980	39 151											
15	44 483	38 056	57 548	30 501	57 387	46 788	13 595	74 155	46 175	51 952	45 272	37 358	62 879	96 353	1
16	39 168	43 052	50 955	29 413	36 719	59 385	27 268	39 101	78 108	44 538	70 251	39 008	36 446	72 247	1
17	67 779	35 397	34 402	40 993	34 638	46 062	26 677	28 796	64 075	49 362	50 701	67 303	39 753	74 767	1
18	66 220	38 766	33 397	32 827	38 520	43 295	42 543	41 270	46 716	51 465	50 427	50 536	35 063	66 726	1
19	62 648	29 721	21 883	8 477	32 971	48 024	33 491	32 354	33 132	63 977	43 126	36 374	32 275	43 381	1
20	62 329	38 619	24 501	21 721	20 265	34 279	29 212	50 949	23 602	36 281	36 420	25 005	27 512	36 947	1
21	55 450	43 881	30 446	16 161	5 275	31 346	34 366	42 124	38 872	34 609	26 309	23 273	17 808	25 483	1
22	48 977	42 619	20 757	26 141	6 760	26 922	27 845	46 162	32 458	29 809	22 017	19 413	21 360	27 325	1
23	51 256	41 429	13 006	20 111	5 530	23 238	23 549	37 162	22 735	23 257	20 138	16 139	19 566	19 688	1
24	48 206	32 295	46 183	17 556	5 996	18 925	20 408	31 513	24 226	20 336	18 659	10 642	15 416	14 435	1
25	48 444	36 456	46 793	23 865	11 432	20 801	21 497	34 744	26 027	19 503	20 273	16 048	18 012	18 723	1
26	56 691	40 374	58 399	37 418	20 537	24 345	29 747	34 340	26 102	24 035	24 123	21 915	22 500	19 920	1
27	70 506	51 647	69 817	40 429	35 703	28 360	35 839	54 583	41 409	31 352	33 322	21 442	28 157	23 506	1
28	67 580	77 000	73 002	52 943	30 813	32 632	36 072	47 163	40 742	32 772	28 143	43 829	31 143	31 151	1
29	81 279	88 764	68 934	56 807	39 272	2 895	39 852	70 609	45 485	35 803	48 623	46 909	46 633	49 132	1
30	67 970	93 890	77 015	70 332	39 120	1 894	52 137	65 844	56 720	41 345	63 254	50 645	42 211	46 376	1
31	55 216	96 149	73 344	65 908	38 387	3 056	61 350	69 283	59 500	40 344	53 013	68 489	66 590	62 330	1
32	41 371	76 970	67 304	68 588	52 191	1 545	55 974	79 086	58 378	47 120	57 358	65 444	57 196	54 441	1
33	35 030	51 121	55 469	64 508	63 228	2 015	55 179	62 611	54 796	42 838	49 108	52 866	48 218	47 655	1
34	30 511	47 985	41 017	54 471	53 269	10 916	47 809	63 898	50 652	52 879	52 076	63 135	42 396	53 438	1

Film and audiovisual data collection project

35	14 149	36 158	30 287	36 250	50 974	29 109	41 149	55 272	43 818	48 162	49 071	51 214	53 487	48 416	1
36	44 530	32 489	36 412	27 957	45 294	28 048	38 950	45 550	45 305	41 898	49 939	44 354	55 518	61 801	1
37	105 664	91 017	29 237	21 720	28 935	29 804	32 446	42 237	36 739	43 499	46 074	57 018	49 350	65 165	1
38	73 677	61 303	70 647	19 713	23 237	36 473	28 050	36 338	42 082	49 907	52 878	51 929	52 924	56 746	1
39	59 430	51 914	41 589	47 186	21 675	31 511	26 111	39 473	35 134	46 258	42 517	39 987	57 772	68 228	1
40	80 056	48 178	40 025	54 327	21 374	30 697	27 017	40 062	44 944	39 660	64 475	46 535	60 791	55 852	1
41	88 854	50 467	37 568	31 800	78 404	28 541	25 377	36 874	41 091	45 112	61 083	38 272	63 596	62 140	1
42	83 103	40 311	31 679	34 721	40 952	24 594	22 370	28 457	40 796	46 294	57 719	42 978	66 726	65 520	1
43	96 409	39 291	31 671	45 739	37 048	74 839	22 304	24 617	35 392	55 054	54 184	59 089	56 877	65 622	1
44	73 294	41 382	39 231	38 515	34 010	50 253	36 320	33 770	31 297	50 706	55 690	74 042	69 072	65 409	1
45	70 924	41 671	32 470	49 505	31 763	42 431	108 230	31 421	30 056	48 090	76 085	62 557	58 005	55 474	1
46	161 973	120 652	70 808	48 739	29 081	35 773	53 560	89 540	26 102	34 270	58 324	58 881	45 502	52 938	1
47	89 838	89 838	84 612	43 011	27 443	45 531	57 546	70 082	3 058	30 460	48 409	66 466	97 708	63 819	1
48	135 321	67 312	162 046	43 077	33 950	34 031	43 810	55 148	78 657	43 005	48 374	45 293	61 564	52 485	1
49	88 301	79 467	71 200	102 515	33 892	31 231	52 815	51 999	90 612	28 681	33 857	37 827	62 944	56 684	1
50	84 881	66 564	50 555	61 862	47 399	33 151	45 787	44 082	57 947	100 144	40 957	34 210	43 394	195 516	1
51	54 493	69 406	69 393	60 676	111 027	43 671	28 073	58 605	48 729	57 265	78 022	41 004	43 773	48 029	1
52	78 486	114 240	104 939	86 555	84 918	58 371	64 894	74 406	40 678	82 558	89 166	75 835	84 777	68 963	1
53	119 510	0	0	0	0	83 519	0	0	69 343	91 714	67 636				0
CUM	3 397 287	2 977 865	2 589 880	2 114 495	2 123 800	2 072 551	2 070 383	2 735 551	2 493 752	2 615 672	2 678 627	2 531 621	2 730 982	3 294 742	52
AVG	64 100	57 267	50 180	40 663	40 842	39 105	39 815	52 607	47 052	49 352	50 540	48 685	52519	63360	
%	100%	101%	0.99	1	1	0.98	0.98	1.29	1.18	1.24	1.27	1.2	1.29	1.56	
Other	14%	12%	0.11	0.09											

Source: Empire Cinemas figures – Empire – Beirut, October 2012.



**- Theatres Report - Week 42 (from 11<sup>th</sup> to 17<sup>th</sup> October 2012)**

	<b>Cinemas</b>	Number of screens per multiplex	Number of seats per multiplex	Number of projections /week	Total admissions week42/2012	Total admissions week42/2011	Accumulated ticket sales Until week42 2012	Accumulated ticket sales Until week42 2011	Accumulation difference 2012/2011	Accumulation difference 2011/2012 in %	MS of multiplexes till Week 42/2012	Rate of occ. week 42/2012	Rate of occ. year 2012
1	<b>Cinema City</b>	10	2 200	30	10 452	24 724	644 092	723 138	-79 046	-11%	26%	15.84%	25.02%
2	<b>Grand ABC</b>	7	1 090	30	8 499	10 620	496 955	518 255	-21 300	-4%	20%	25.99%	38.97%
3	<b>Grand Concorde</b>	8	1 733	28	2 156	2 505	175 927	149 656	26 271	18%	7%	4.44%	9.30%
4	<b>Grand Saida</b>	5	770	28	2 058	2 569	159 245	125 440	33 805	27%	7%	9.55%	18.94%
5	<b>Grand ABC Dbayeh</b>	8	1 040	28	5 973	0	144 173	0	144 173	0%	6%	20.51%	12.69%
6	<b>Espace</b>	5	1 099	28	2 008	7 948	119 163	134 720	-15 557	-12%	5%	7.11%	10.82%
7	<b>Empire Dunes</b>	5	1 022	28	2 026	7 626	114 375	146 490	-32 115	-22%	5%	7.08%	10.25%
8	<b>Galaxy</b>	6	1 036	28	1 712	6 712	103 826	104 283	-457	0%	4%	5.90%	9.18%
9	<b>Planète-Abraj</b>	8	1 545	28	1 336	1 229	97 784	66 365	31 419	47%	4%	3.09%	5.80%
10	<b>Grand Las Salinas</b>	4	1 206	21	1 894	1 599	88 411	69 973	18 438	26%	4%	7.48%	8.95%
11	<b>Stargate</b>	5	855	28	1 540	2 474	80 934	63 190	17 744	28%	3%	6.43%	8.67%
12	<b>Empire Sodeco</b>	6	820	28	629	8 090	77 872	80 809	-2 937	-4%	3%	2.74%	8.70%
13	<b>Planète-Tripoli</b>	4	641	28	599	4 391	66 382	75 720	-9 338	-12%	3%	3.34%	9.48%
14	<b>Empire Sofil</b>	2	530	28	83	2 048	30 845	35 431	-4 586	-13%	1%	0.56%	5.33%
15	<b>Cinemall</b>	8	1 002	28	4 876	0	21 977	0	21 977	0%	1%	17.38%	2.01%
	<b>Total Empire</b>	34	6 617	28	16 910	57 148	1 090 173	1 224 871	-134 698	-11%	44.70%	9.13%	15.09%
	<b>Total Planète</b>	15	2 186	28	1 935	5 769	168 198	161 386	6 812	4%	6.9%	3.16%	7.05%
	<b>Total Grand</b>	32	5 839	27	20 580	14 724	1 064 711	737 884	326 827	44%	43.6%	13.05%	17.32%
	<b>Total other cinemas</b>	5	855	28	1 540	5 462	99 055	219 716	-120 661	-55%	4.1%	6.43%	10.61%
	<b>Total Cinemall</b>	8	1 002	28	4 876	0	21 977	0	21 977	0.0%	0.9%	17.38%	2.01%
	<b>Total Market share</b>	94	16 499	139	45 841	83 103	2 444 114	2 343 857	100 257	4%	100%	2.00%	2.73%

Source: Figures and data established by Empire, Beirut, October 2012

### 9.11 Theatrical Analysis – Lebanon 2010 – Period: 31<sup>st</sup> December 2009 to 29<sup>th</sup> December 2010<sup>1</sup>

The following tables developed by Empire reflect the conditions of the film market in Lebanon in 2010. The first table shows ticket sales and global box office for different movie theatres. In total, the number of admissions is estimated at 2,794,708 reaching 29,467,874 500 USD (22.2 million EUR).

#### - Admissions and gross receipts (Lebanon 2010)

Operator	Number of admissions	Gross receipts USD	G.B.O in %
Empire	1 510461	16 707 032 000	56.70%
Grand Cinema	917 936	9 235 686 000	31.34%
Planète	254 039	2 384 396 500	8.09%
Stargate	79 199	822 611 000	2.79%
Kaslik	28 308	271 019 000	0.92%
Other	4 765	47 130 000	0.16%
<b>TOTAL</b>	<b>2 794 708</b>	<b>29 467 874 500</b>	<b>100%</b>

The table below lists Box office figures for different regions in Lebanon indicating figures for theatres: a total of 29,467,874,500 USD i.e. 22.2 million EUR<sup>2</sup>.

#### - Box office of different regions Lebanese (2010)

G.B.O per region	Operator Empire	Planète	Stargate	Kaslik	Other	Grand Cinemas	Total	Total in %
Beirut	15 178 139 000	863 265 000			47 130 000	8 577 986 000	24 666 520 000	83.71%
Jounieh	1 528 893 000	778 494 000		271 019 000			2 578 406 000	8.75%
Tripoli		742 637 500				657 700 000	1 400 337 500	4.75%
Zahle			822 611 000				822 611 000	2.79%
<b>TOTAL</b>	<b>16 707 032 000</b>	<b>2 384 396 500</b>	<b>822 611 000</b>	<b>271 019 000</b>	<b>47 130 000</b>	<b>9 235 686 000</b>	<b>29 467 874 500</b>	<b>100%</b>

American films fill an important position in the cinema market in Lebanon. While American films screened in Lebanese theatres in 2010 reached 87.10% of market share with a number of admissions of 2,404,042 and total box office receipts reaching 25,667,850,000 USD (19.3 MEUR), local films only registered 16,666 ticket sales reaching 145,480,000 USD i.e. 109,771,000 EUR. The following table lists 2010 figures for local, American and other productions.

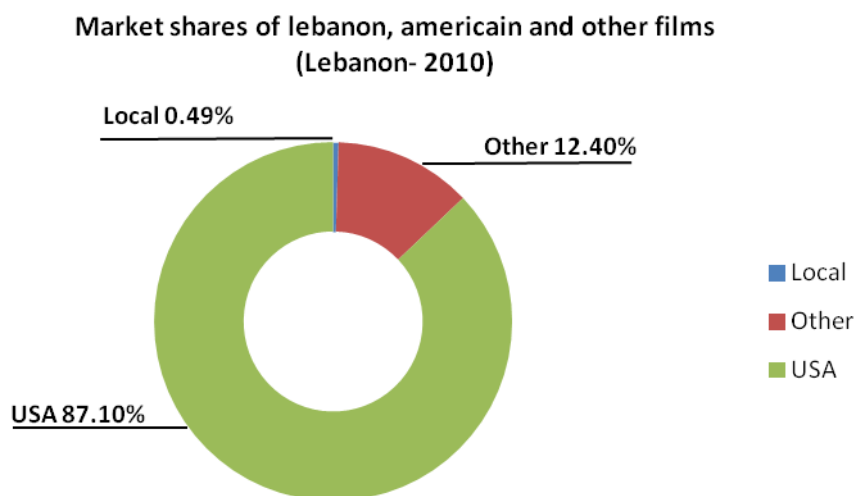
<sup>1</sup> Data is developed by Empire, and provided to us by Empire during our data collection mission in Lebanon, October 2012.

<sup>2</sup> The Euro conversion is based on the exchange rate from Oanda Currency Converter as of 31 December 2010; <http://www.oanda.com/lang/fr/currency/converter>

**- Market share of local, American and other productions (Lebanon 2010)**

Production	Admissions	G.B.O USD	%
Local	16 666	145 480 000	0.49%
Other	374 000	3 654 500	12.40%
USA	2 404 042	25 667 850 000	87.10%
<b>Total</b>	<b>2 794 708</b>	<b>29 467 874 500</b>	<b>100%</b>

Source: Empire- Theatrical Analysis Lebanon 2010, period: Dec 31, 2009- Dec 29, 2010

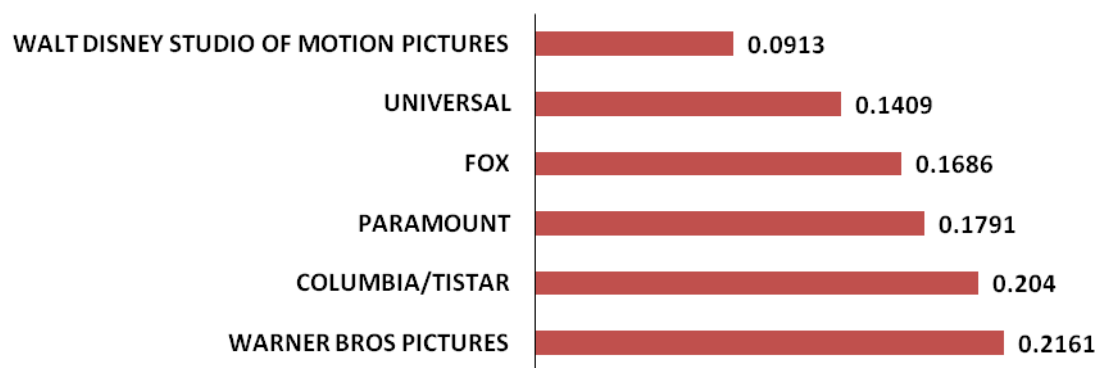


Source: Theatrical Analysis, Lebanon, 2010

The following chart defines market shares between the six large US production and distribution companies with films distributed in Lebanon in 2011: Warner Bros Pictures, Columbia Tristar, Paramount, Fox, Universal, and Walt Disney Studio of Motion Pictures.

According to data provided by Empire: Warner Bros Pictures is in the lead with a market share of 21.6%. Columbia/Tristar holds the second rank with a market share estimated at 20.40%, followed by Paramount with 17.91%.

### Market Shares of american studio's productions in Lebanon (2011)



Source: Majors Market Share 2011- Empire

## 9.12 Data on success of local films in 2012

Based on the following data collected from Empire related to box office receipts for local films in 2012, the 19 films in the table below reached a total receipts of 3 638 209 LBP (2 383 63 USD i.e. 1 814 430 EUR).

### Rating of the 19 best Lebanese films by admissions (2012)

Local Film Title	Admissions	Prior admissions	Total admissions	G.B.O in (LBP)	Prior G.B.O	Total G.B.O in (LBP)
WA HALLAK LA WEIN? (Et maintenant on va où?)	32 129	289 722	321 851	339 040 000	3 107 644 000	3 446 684 000
KHALLET WARDE	12 847	9 046	21 893	107 833 000	81 633 000	189 466 000
ABOU KEES	67	180	247	529 000	1 530 000	2 059 000
CASH FLOW (2D)	58 532			618 883 500		
TAXI ALBALAD (2D)	15 571			168 352 000		
MAN OF HONOR (2D)	936			9 179 000		
33 DAYS (2D)	21 929			199 101 500		
SECTOR ZERO (2D)	527			4 057 000		
TANNOURA MAXI (2D)	16 335			177 791 500		
GATE #5 (2D)	372			2 901 000		
MY FATHER IS STILL A COMMUNIST (2D)	569			2 845 000		
MARCEDES (2D)	1 235			9 643 000		
IT'S ALL IN LEBANON (2D)	666			5 160 000		
POLL DIARIES (2D)	29			145 000		
OK, ENOUGH, GOODBYE (2D)	113			892 000		
YAMO (2D)	210			1 665 000		
IT'S ALL ABOUT MY FATHER (2D)	186			1 476 000		
PLAY ENTITLED, A (2D)	259			2 849 000		
MY LAST VALENTINE IN BEIRUT (3D)	8 681			115 140 500		
<b>Total</b>	<b>171 193</b>	<b>298 948</b>	<b>343 991</b>	<b>1 767 483 000</b>	<b>3 190 807 000</b>	<b>3 638 209 000</b>

Source: 2012 Local Titles - Empire, December 2012

### Rating of 20 best American films by receipts in Lebanon (2012)

Box Office Mojo lists 100 American films screened in Lebanese theatres in 2012. The 20 American films marking the Lebanese Box Office make a total of 10,083,023 USD (7,647,810 EUR).

Rank	Title of film	Distributor	Total Gross in USD	Release
1	Skyfall	n/a	949.218	11/1
2	The Amazing Spider-Man	Sony	835.612	7/5
3	Taken 2	n/a	834.251	10/4
4	Step Up Revolution	Jaguar	762.846	1/8
5	Ice Age: Continental Drift	Fox	644.503	1/6
6	The Twilight Saga: Breaking Dawn Part 2	Jaguar	597.538	1/11
7	The Dark Knight Rises	WB	562.986	1/8
8	The Expendables 2	n/a	560.668	1/8
9	The Avengers (2012)	Disney	534.555	5/3
10	Madagascar 3: Europe's Most Wanted	UIP	503.460	1/6
11	The Dictator	UIP	411.142	1/6
12	Cash Flow	n/a	409.327	1/1
13	Hotel Transylvania	Sony	388.806	1/10
14	This Means War	Fox	387.081	1/2
15	Snow White and the Huntsman	UIP	345.335	1/5
16	Brave	Disney	324.747	1/8
17	Titanic 3D	Fox	281.777	4/5
18	American Reunion	UIP	271.983	4/5
19	MIB 3	Sony	243.140	1/5
20	Ted	UIP	234.048	1/8

Source: Box Office Mojo, Lebanon Yearly Box Office 2011, [www.boxofficemojo.com](http://www.boxofficemojo.com), page consulted on 20 December 2012

### Price of ticket

According to figures provided by Empire, the prices of cinema tickets in 2012 in Lebanon are as follows:

- Morning show: 8,000 LBP
- Evening show: 11,000 and 12,000 LBP
- 3D Film: 14,000 and 15,000 LBP
- VIP: 45,000: LBP
- Club Class: 18,000 LBP

### 9.13 Co-production policy

Lebanon signed with France a co-production and exchange agreement on 27<sup>th</sup> March 2000<sup>1</sup>. Lebanese productions are mostly co-productions with France. Still some productions are realized with Germany, Belgium, Denmark, Canada, Egypt and some Gulf countries. To compensate the lack of public funds, operators seek funds from the private sector; a true trend for sponsorship is developing in Lebanon.

It is important to note that, especially after the years 2000, among Lebanese films, a number of feature films are coproduced sometimes as minority shares. These include the two large successes by Nadine Labaki *Where do we go now?* (2011) and *Caramel* (2007), as well as *The Kite* by Randa Chahal Sabag (2003).

Among French Lebanese co-productions from 2012, there are two feature films *The Lebanese Rocket Society* by Khalil Joreige and Joana Hadjithomas and *Too Much Love Will Kill You* by Christophe Karabache. The French co-producer of the first is «Mille et Une Nuits» and «Cinemorphose Productions» for the second.<sup>2</sup>

Other co-productions enable Lebanese films to enjoy a good presence in international festivals. As an example: *A World not ours (Un monde qui ne nous appartient pas)* by Mehdi Fleyfel. This documentary is a co-production between Great Britain, Denmark and Lebanon, and it was premiered in September 2012 at the Toronto International Film Festival (TIFF)<sup>3</sup>. *Kayan* is another co-production but Lebanese Canadian this time, winning the New Currents Award: a category dedicated to discovery and reserved to Asian filmmakers, at the Busan International Film Festival (BIFF)<sup>4</sup>.

Data related to co-productions is available in the report *Census and Analysis of film & Audiovisual Co-productions in the South-Mediterranean Region 2006-2011*<sup>5</sup>.

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<sup>1</sup> Film co-production agreement between France and Lebanon signed in Beirut on 27 March 2000, French Decree No. 2000-1026 of 18 October 2000, (O.J. 21 October 2000); available at: <http://www.cnc.fr/web/fr/accords-internationaux/-/editoriaux/37707;jsessionid=849CA5819C78E8428FEF195136A4268F.liferay>

<sup>2</sup> <http://www.unifrance.org/box-office/74786/Lebanon/films-co-produits>

<sup>3</sup> See " *Les Libanais font de nouveau parler d'eux dans le monde du 7e art* ", L'Orient le jour, 29/10/2012; [http://www.lorientlejour.com/article/784550/Les\\_Libanais\\_font\\_de\\_nouveau\\_parler\\_deux\\_dans\\_le\\_monde\\_du\\_7e\\_art.html](http://www.lorientlejour.com/article/784550/Les_Libanais_font_de_nouveau_parler_deux_dans_le_monde_du_7e_art.html)

<sup>4</sup> Ibid.

<sup>5</sup> L. ROSANT, *Census and Analysis of film & Audiovisual Co-productions in the South-Mediterranean Region 2006-2011*, EUROMED AUDIOVISUAL III, Tunis, May 2012; <http://euromediaudiovisuel.net/Files/2012/05/29/1338310192044.pdf>

**- Number of co-productions from Lebanon per year and genre (2006-2011)**

	FICTION	DOC.	TOTAL
2006	2	0	2
2007	5	2	7
2008	1	2	3
2009	1	1	2
2010	1	0	1
2011	7	10	17
Post-Prod.	0	3	3
<b>TOTAL</b>	<b>17</b>	<b>18</b>	<b>35</b>

Source Euromed Audiovisual III (L. Rosant, 2012)

**- Partner co-production countries with Lebanon (2006-2011)**

Country	Fiction	Documentaries	Total	%
Belgium	1	0	1	2%
Canada	0	3	3	6%
Egypt	2	1	3	6%
France	11	7	18	37%
Germany	1	3	4	8%
Hong-Kong	1	0	1	2%
Jordan	0	1	1	2%
Morocco	1	0	1	2%
Qatar	0	1	1	2%
Spain	0	1	1	2%
Sweden	1	0	1	2%
Switzerland	1	0	1	2%
U.A.E.	3	7	10	20%
U.S.A	2	0	2	4%
England	1	0	1	2%
<b>Total</b>	<b>25</b>	<b>24</b>	<b>49</b>	<b>100%</b>

Source Euromed Audiovisual III (L. Rosant, 2012)



## 9.14 Distribution of Lebanese films abroad

According to the LUMIERE data base of the European Audiovisual Observatory, between 1996 and 2012, 23 Lebanese films have been distributed in Europe. 9 of these films are French Lebanese co-productions and 8 are majority co-productions with France and sometimes with partners (Canada, Egypt, United Kingdom). Finally, *Circumstances* by the Iranian director Maryam Keshavarz is a co-production between the United States /Iran/France/Lebanon filmed in Beirut.

### - Lebanese films admissions in Europe (1996 - 2012)

Film	Production	Year	Production																	Total U.E.			
			AT	BE	BG	CH	DE	DK	ES	FR	GB	GR	HU	IS	IT	LU	NL	NO	PL		PT	SE	TR
Caramel	FR / LB	2007	14 707	26 034		29 956	127 739	4 277	218 917	515 687	96 203		10 718	357	266 730		6 458	14 394	51 686	17 562	7 729	11 305	1 364 447
Et maintenant, on va où?	FR / LB / EG	2011				6 959		2 411	546	384 993	14 398				92 077			6 469	22 199	7 721			524 345
West Beyrouth	LB / FR	1998		2 177		8 538				13 255	17 209	15 000			11 180			4 154			1 549		60 370
Le cerf-volant	FR / LB	2003		1 171		5 160					42 137		2 497										45 805
Circumstance	US / HK / FR / LB	2011							3 171		26 222	990				10 082					3 918		44 383
Sous les bombes	LB / FR / GB	2007									17 033	3 023			10 660							2 696	30 716
A Perfect Day	FR / LB / DE	2005									19 463							137					19 463
Dunia	LB / EG / FR	2005	1 263			19 402	3 627				9 243												14 133
Je veux voir	FR / LB	2008		209					1 958		10 268	169								1 055			13 659
Une chanson dans la tête	FR / LB	2008		1 314							9 286					55							10 655
Bosta	LB	2005									9 629												9 629
Civilisées	LB / FR	1999									9 131												9 131
Terra incognita	LB / FR	2002									6 639												6 639
Chaque jour est une fête	FR / LB / DE	2009			41	1 949					6 521												6 562
Falafel	LB / FR	2006									5 719												5 719
Phantom Beirut	LB / FR	1998									5 685												5 685
Massaker	FR / DE / LB	2005									3 187												3 187
Autour de la maison rose	LB / FR / CA	1999									1 841												1 841
Balle perdue	LB	2010									1 419												1 419
One Man Village	LB	2008									380												380
Beirut Kamikaze	FR / LB	2010									140												140
Goodbye Moubarak	LB	2011									75												75
En attendant Abou Zayd	LB	2010									21												21
			15 970	30 905	41	71 964	131 366	9 859	234 676	1 101 928	129 783	2 497	10 718	357	380 647	55	16 540	25 154	73 885	26 338	13 196	14 001	2 178 404

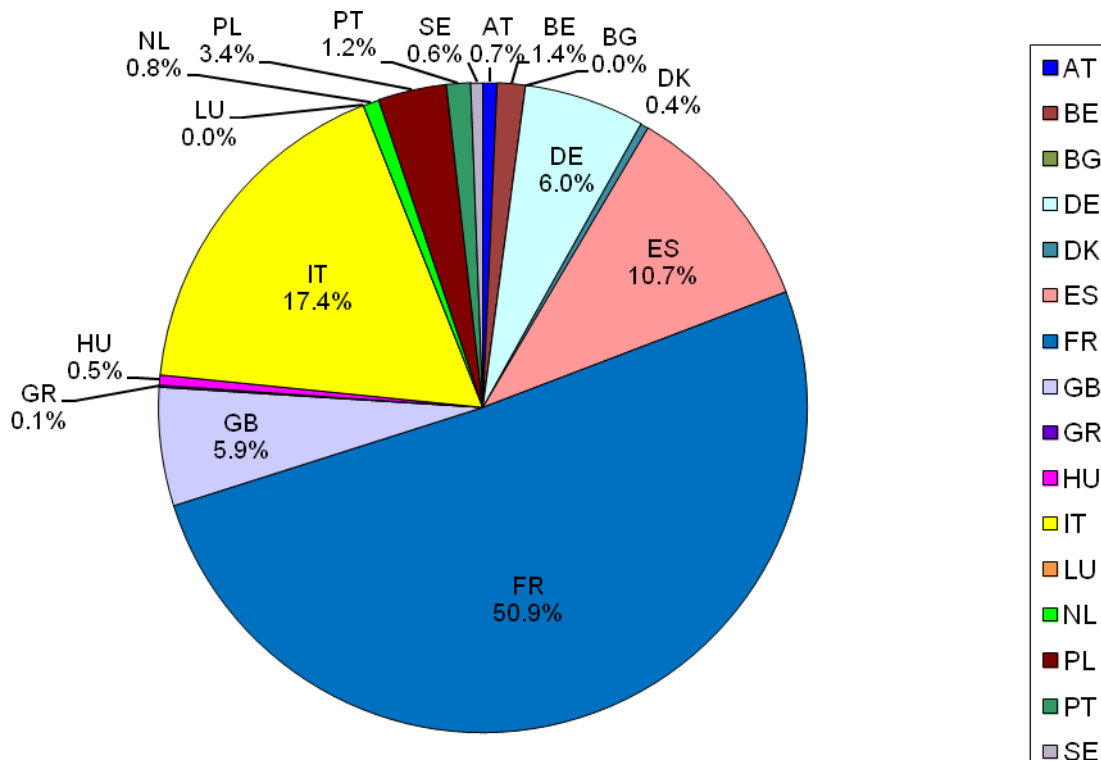
Source : European Audiovisual Observatory / LUMIERE data base

During the period considered, the market share of Lebanese films distributed in the European Union is very small: less than 0%. Based on data from the European Audiovisual Observatory, non-European and non-American films generally represent cumulative market shares estimated between 1% and 2% in the EU<sup>1</sup>.

<sup>1</sup> The LUMIERE database of the European Audiovisual Observatory (<http://lumiere.obs.coe.int>) provides a systematic compilation of available data on admissions of films released in European theatres since 1996. This is the result of the collaboration between the European Audiovisual Observatory and the various specialized national sources as well as the MEDIA Programme of the European Union. The coverage rate for the European Union is of about 90 %. However for less successful films, the database has some gaps due to the fact that some countries do not provide complete listings for all films distributed.

With a result of 1.4 million of admissions, *Caramel* by Nadine Labaki alone reached 62.8 % of admissions for Lebanese films in the European Union during the years 1996-2012. Where do we go now? (*Et maintenant on va où*), by Nadine Labaki (for which all 2012 data is not yet available) reached over 537.000 of admissions.

**Distribution by territory of Lebanese films admissions in the European Union (2001-2012)**



Source: European Audiovisual Observatory / LUMIERE data base

With about 51 % of admissions for the period 1996-2012, France is the first outlet of Lebanese films in the European Union. It is followed by Italy (17.4 %) and by Spain (10.7 %).

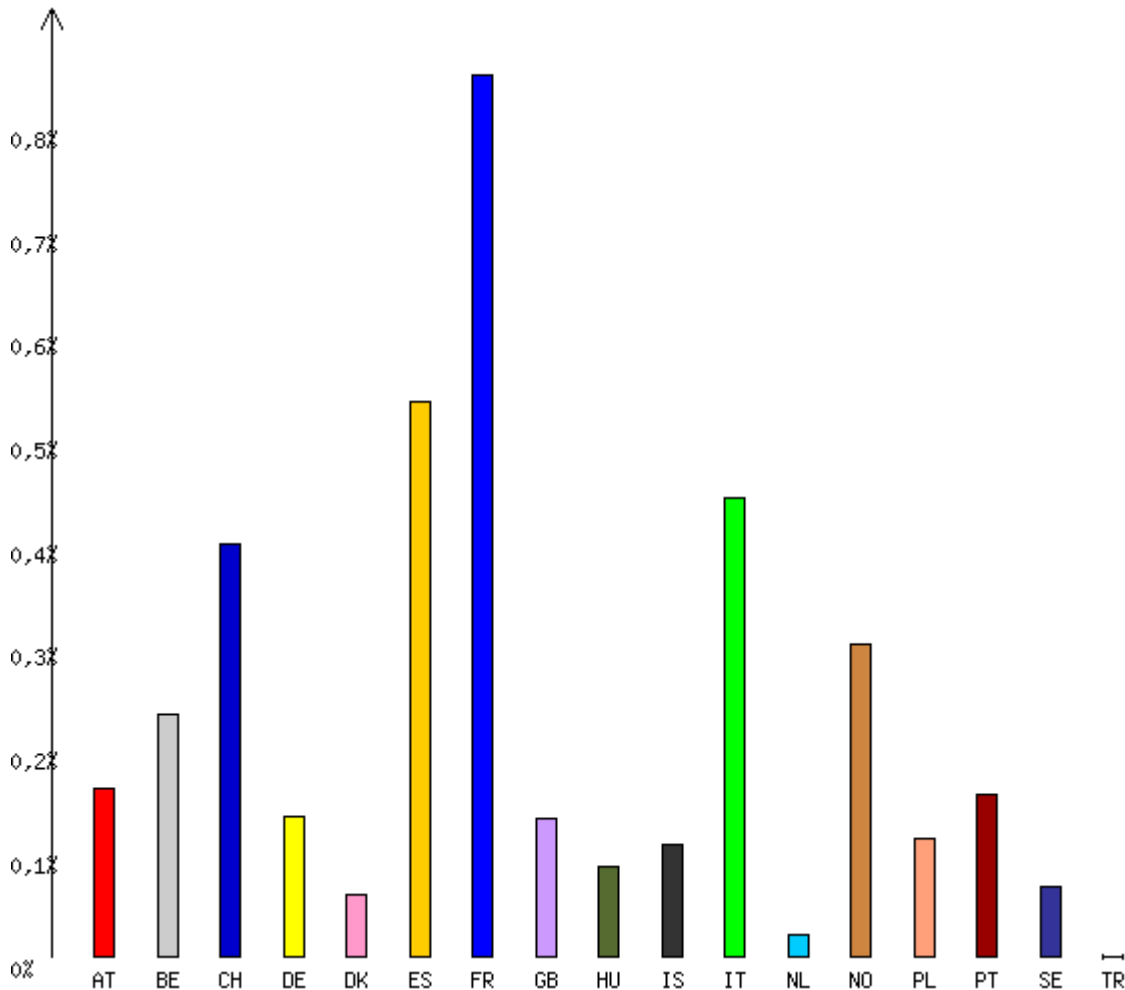
This means that for Lebanese and Arab films in general, an important number of European markets remain extremely closed, probably more so than Lebanese and Arab markets themselves could be to European, American and other films. (See graph about market shares for Lebanese, American and other films in Lebanese cinemas – 2010, p.92)

The causes of these closed markets are obviously multiple. The domination of the European market either by domestic production or American films and the near absence of a true Lebanese structure for distribution in Europe yet limit the opportunities of a strong presence of the Lebanese film in Europe. The co-production practice (in particular with France) seems to be the best access point to the European market.

The reasons explaining the poor circulation of Lebanese films in Europe are also valid for films from the European countries in Lebanon, but also for films of other origins: Russian films, African films, Asian films. In addition, all these "other" cinema productions are inevitably in a strong competition with the American film industry which holds the first rank on the local market with

87.10%, the (other European, Egyptian, Indian, etc.) production which holds 12.40% and the Lebanese film at the third position with a rate of 0.49%.

### Penetration rate of *Caramel* (number of admissions / number of inhabitants)



Source: European Audiovisual Observatory – LUMIERE data base

Data related to the penetration rate of *Caramel* confirm that France, Spain and Italy are proportionally the countries most receptive to this emblematic film. Similarly, other francophone countries, Switzerland and Belgium, have satisfying rates. But it is interesting to note that Norway ranks in fifth position, indicating that the cultural distance and language are not necessarily obstacles to reception.

We have little data regarding Lebanese films in other parts of the world.

### 9.14 The physical video market

With respect to distribution of DVDs, Lebanon belongs to zone 2 comprising Japan, Europe, South Africa, the Middle East and Egypt<sup>1</sup>.

<sup>1</sup> Manufacturers have set up a zone system mainly used to limit exports of discs outside designated regions, which enables editors to maintain control over sale prices and release date individually in each region of the planet.

The market for video lacks documentation. Various editors from Lebanon or other Arab countries (in particular the Saudi Group Rotana) release domestic films. American studios distribute their films in original version. The main points of sales are specialized retailers (Virgin Megastore ...).

Some Lebanese films are available in Europe and the United States in DVD form.

#### 9.14.1 DVDs editions of some Lebanese films in France, United Kingdom and USA

	FR	GB	US
Caramel	FV, OVFST (BAC)	OVEST (Momentum Pictures)	Available in VoD (Amazon Instant Video)
Et maintenant on va où	FV, OVFST (Pathé)	OVEST (Revolver Entertainment)	Available in VoD (Amazon Instant Video)
West Beyrouth		OVEST (Metrodome)	VOESTn (New Yorker Video)
Falafel	(Les films du Paradoxe)		
Le cerf volant	OVFST, OVEST (Lancaster)		OVEST (First Run Features)
Je veux voir	OVFST, OVEST (Shellac Films)	OVEST (Soda Pictures)	OVEST (Typecast releasing)
A perfect day	OVFST (Tamasa Distribution)		OVEST (Facets Video)
Une chanson dans la tête	OFV (France Televisions Distribution)		
Beirut Diaries			OVEST (AFD)
Massaker	OVFST, OVEST (Ciné Malta)		

Source: European Audiovisual Observatory

#### 9.14.2 Recent beginnings of VoD and online piracy

Even though the online use of films and television series is dominated, in Lebanon as in the rest of the world, by piracy, there are attempts to launch legitimate offers in the whole Arabic speaking market. Saudi Arabia and the Gulf States seem to be the main markets in a starting phase. The shofha.com website, operated from Egypt by LINKonline, a subsidiary of LINKdotNET (a company of the Group Orascom Telecom Holding), is available on internet in Lebanon and allows access to a catalogue of Arab films<sup>1</sup>. We do not have details about notoriety or success of this service in Lebanon.

We do not have knowledge of websites for legitimate VoD offer established in Lebanon. It is however not difficult to find free streaming offers on Internet (most probably unauthorized)<sup>2</sup>. The <http://www.bokra.net> website offers Arab, Turkish and foreign films, and TV series and television

<sup>1</sup> See S. ALI, *Data collection initiative for the film markets of nine Mediterranean countries. First intermediary report Country monographs: EGYPT, Euromed Audiovisual III / European Audiovisual Observatory, 2012, p.66.* <http://www.euromediaudiovisuel.net/Files/2012/09/17/1347873169237.pdf>

<sup>2</sup> The website Watcharabicmovies.net offers 12 Lebanese films in free access: [http://www.watcharabicmovies.net/Lebanese\\_movies/Lebanese\\_Arabic\\_Movies\\_1.html](http://www.watcharabicmovies.net/Lebanese_movies/Lebanese_Arabic_Movies_1.html)

programmes in streaming; same as the website <http://www.3afrit.net/> which offers Lebanese, Egyptian and Moroccan films.

About fifteen Lebanese films (or minority Lebanese co-production films) are accessible on French websites dedicated to art cinema, in particular the website Universciné<sup>1</sup>. *Where do we go now?* is available in FV and OVFST on the French iTunes Store, however, *Caramel* is not.

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<sup>1</sup> <http://www.universcine.com/films/pays/Liban>

## 10. COPYRIGHT AND RELATED RIGHTS IN LEBANON

The law on copyright and related rights dates back to 1999 (Law No. 75 of 3<sup>rd</sup> April 1999 for the protection of literary and artistic property)<sup>1</sup>. Lebanon is part of the Berne Convention (Paris Act, 1971), the Rome Convention and WIPO Agreement. The competent body is the Intellectual Property Office under the authority of the Ministry of Economy and Trade.

In accordance with this law, the Prosecutor General, the person abused or the chairman of the Protection of intellectual property Body are entitled to file a case against any violation of copyrights or related rights in Lebanon. Nevertheless, it is to be noted that most authors prefer registering their scripts and film titles at private agencies for the protection of intellectual property.

The fight against piracy is an important challenge to be faced by the Ministry of Economy and Trade working in cooperation with other public and/or private bodies for the protection of intellectual property rights in Lebanon<sup>2</sup>.

The Regime for film and audiovisual works<sup>3</sup> in Law No. 75 of 3<sup>rd</sup> April 1999 for the protection of literary and artistic property covers inter alia:

### *Copyright holders*

- Authors (unless otherwise agreed, the producer is deemed to be the copyright holder)
- Performing or recording artists;
- Radio and television broadcasters.

### *Rights protected:*

#### ➤ *Copyrights*

- Property rights: reproduction rights; right of adaptation and translation; right of distribution; rental right; importation right; representation right; broadcasting right; right of communication to the public by cable retransmission or other means, right of making available to the public.
- Moral rights: right to claim authorship; right to respect of integrity; right of disclosure; right of withdrawal.

#### ➤ *Rights of performing or recording artists:*

- Property rights: right of communication to the public and broadcasting; right of unfixed performances; fixation right; rights of reproduction, sale and rental of recordings containing an unauthorized fixation of the performance.
- Moral rights: right to claim authorship; right to respect of integrity.

#### ➤ *Rights of radio and television broadcasters:*

- Property rights: right to authorize broadcasting of programmes, fixation, reproduction of unauthorized recordings of programmes, communication to the public when admission is paid.

On the other hand, a branch of the Society of Authors, Composers and Music Publishers SACEM<sup>4</sup> is present in Lebanon. It is a generalist collective management Society, mainly active

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<sup>1</sup> The text of Law No.75 from 1999 is available in English, French and Arabic on the website of the World Intellectual Property Organization WIPO: <http://www.wipo.int>, the French version is available at: [http://www.wipo.int/wipolex/fr/text.jsp?file\\_id=128486](http://www.wipo.int/wipolex/fr/text.jsp?file_id=128486)

<sup>2</sup> <http://www.economy.gov.lb/index.php/subCatInfo/1/62/14/2>

<sup>3</sup> Legal database of the Euromed Audiovisual Programme, Industry and legislation; <http://www.euromedaudiovisual.net/p.aspx?t=general&mid=53&l=fr&did=84>

<sup>4</sup> <http://www.sacem.fr>

Film and audiovisual data collection project

in the music sector. SACEM supports its members and the professional branch in their music projects for design, distribution and training.

## 11. PIRACY

Legitimate business is however confronted with the piracy market. In its *2012 Special 301 report on Copyright Protection and Enforcement*, the International Intellectual Property Alliance (IIPA) recommends to maintain Lebanon on the Watch List in 2012<sup>1</sup>.

Despite gradual progress noted at the beginning of the report, piracy continues to harm rights-holders in Lebanon. Piracy phenomena include piracy of corporate software, cable, piracy of paying television, retail piracy (films, music, entertainment software / games, management software, publications), and piracy of books in the form of illegal photocopying around university complexes as well as illegal translations and counterfeit trade manuals.

Internet piracy increases, as well as mobile telephone piracy (either downloads on mobiles or sale of pre-downloaded content), hard disk for downloading of software on computers in retail stores, and sale of bypass equipment, in particular pay television decoders. Despite incremental progress, industry data indicate a high level of piracy. It has been demonstrated that because of piracy, the Lebanese government loses huge funds in terms of lost taxes, social security contributions and profits.

In 2010, the rate of software piracy in Lebanon is estimated at 72% meaning a trade value of 27 million USD (20.3 million EUR). This amount corresponds to the piracy of illegal software attributable to American retailers; (the figure is higher than in 2009 estimated at 25 million USD i.e. 17.4 million EUR<sup>2</sup>). The BSA portal (Business Software alliance) <http://portal.bsa.org/globalpiracy2010/index.html> while maintaining the piracy rate in Lebanon at 72%, estimates at 49 million USD the total trade value of software piracy in Lebanon. Despite efforts by the Lebanese government to curb piracy<sup>3</sup>, physical piracy (DVD) remains enormous in retail stores and street stalls. It is an important problem in most Lebanese cities and an obstacle to the development of the market.

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<sup>1</sup> Lebanon, International Intellectual Property Alliance (IIPA), 2012 SPECIAL 301 REPORT ON COPYRIGHT PROTECTION AND ENFORCEMENT, <http://www.iipa.com/rbc/2012/2012SPEC301LEBANON.PDF>

<sup>2</sup> The conversion of American currency in EUR is based on the exchange rates of Oanda Currency Converter as of 31 December 2009 and 31 December 2010; <http://www.oanda.com/lang/fr/currency/converter/>

<sup>3</sup> See Tamara Qiblawi, *Beirut Boosts Efforts to Protect Copyright Owners*, The Daily Star, 10 December, 2010, available at <http://www.dailystar.com.lb/Business/LebanoN/Aec/10/Beirut-boosts-efforts-to-protect-copyright-owners.ashx#axzz2FK6Kc4Kb>. The article mentions a workshop organized in 2010 by the World Intellectual Property Organization during which the Minister of Economy Fuad Fleifal affirmed that the government intensified its campaign against violations of intellectual property rights by reinforcing surveillance and calling upon rights-holders to resort to competent courts.



## 12. CENSORSHIP

The Censorship Board under the authority of the Directorate for General Security is the body in charge of censorship in Lebanon. The Board exercises prior control on films to be screened in the Republic of Lebanon.

Censorship is regulated by the law promulgated on 27<sup>th</sup> November 1947, related to subjecting all films to censorship<sup>1</sup>.

According to article 1 of the 1947 Law "all films are subject to censorship and may not be screened to the public in movie theatres or any other facility without authorization from the Directorate for General Security. Censorship covers all types of films, whether they are imported or filmed in Lebanon"<sup>2</sup>.

It is worth noting that this article also applies to films imported for the second time even if they have been subject to censorship at their first import. An ad hoc committee (comprising government agents of different ministries) is responsible, in accordance with the law, for deciding upon possible censorship cases.

Article 7 of the same law stipulates that a censorship advice must be attached to the film. Censorship rights must also be paid in advance for each film (article 8). In case of screening refusal of the film, these rights are not reimbursed.

Before end 2009, several cases of censorship occurred<sup>3</sup>:

- Withdrawal of broadcast licences for *Help*, first feature film by the Lebanese filmmaker Marc Abi Rashed.
- Five-minute cut for *The one man village*, first documentary by Simon Haber.
- Prohibition of two feature films by Paolo Benvenuti, after opinion of the "Catholic Media Council". This Council provides, with other religious institutions, "consultative" opinions to public agents of General Security.

In December 2011, director Danielle Arbid announced that, following a procedure from General Security and its ad hoc committee, her film *Beirut Hotel* (supposed to be released in theatres in Beirut on 19<sup>th</sup> January 2012) had been banned in Lebanon<sup>4</sup>. The film was rejected by the censorship committee under the pretext that its plot "constitutes a source for issues regarding the assassination of Rafiq Hariri" (the former Prime Minister killed on 14<sup>th</sup> February 2005)<sup>5</sup>. The film was finally released on 20<sup>th</sup> January 2012 in France, on the channel Arte.

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<sup>1</sup> The text of the law promulgated on 27<sup>th</sup> November 1947, on subjecting all films to censorship is available on Euromed Audiovisual website: <http://www.euromediaudiovisuel.net/Files/2010/03/26/1269563837496.pdf>

<sup>2</sup> Ibid.

<sup>3</sup> See Sana'à Al Khoury, *La censure au Liban: Chaque jour est une fête*, 29/01/2010, <http://hirondelles-beyrouth.blogspot.com/2010/01/la-censure-au-liban-chaque-jour-est-une.html>. The article comprises video testimonies of directors Simon Haber and Marc Abi Rashed telling their experiences with censorship. The website Virtual Museum of Censorship lists, year after year, cases of film censorship in Lebanon: <http://www.censorshiplebanon.org/Categories/Movies-DVDs>.

<sup>4</sup> See "Beirut Hotel" censored in Lebanon, *Courrier International*, 12/12/2011, <http://www.courrierinternational.com/breve/2011/12/12/beirut-hotel-censure-au-liban>

<sup>5</sup> Ibid.

The last case reported dates back to January 2013 and is about *Too Much Love will Kill You* by Christophe Karabache. The film was prohibited by General Security which considered the film too blasphemous and provoking for Lebanon, where it was partly filmed.<sup>1</sup>

### 13. PROSPECTS FOR THE FUTURE

As previously highlighted, in spite of gaps and obstacles hindering the development of film industry in Lebanon, the sector is presently doing much better than before. Development is certainly slow but it is there.

To conclude this analysis of the film market, the following points summarize and highlight gaps and difficulties of the Lebanese film market, but also its strengths and weaknesses.

The implementation of a strategy for the film industry in line with the general strategy of the State and its budget seems to be necessary to establish a sound infrastructure for the film industry in Lebanon. A series of complementary measures recommended by operators are likely to contribute<sup>2</sup> to the growth of the Lebanese film market, we list inter alia:

- Increased flexibility and adaptation of laws to the needs of the sector;
- Creation of a substantial support fund;
- Development of CNC;
- Facilitation of customs services, exemption of some taxes,
- Increased flexibility of censorship,
- Facilitation of work permits, of equipment transportation (film rolls and teams, ...)
- Involvement of television in production or through re-purchase of films and also dedication of more airtime to films.
- Preservation of cinema archives and Télé-Liban archives.

The expansion of the advertising and musical video production market, of production companies and technology equipment providers already present in the country provide the Lebanese market with a highly operational structure. The presence in Lebanon of a profession comprising filmmakers, talented directors and competent, trilingual and experimented professionals is a serious asset.

The opening of new cinema multiplexes in Beirut and various regions, co-productions and the success of Lebanese films in national and international festivals are good indicators likely, in case of political stability, to attract more investment in the sector enabling Lebanon to keep and maintain its rank as one of the most important Arab and Mediterranean platforms in the audiovisual and cinema sectors.

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<sup>1</sup> See the blog of the director, December 2012: <http://karabache.wordpress.com/2012/12/>

<sup>2</sup> See in particular the conclusions of the roundtable held by Euromed Audiovisual in Beirut, 20<sup>th</sup> January 2012: <http://www.euromedaudiovisuel.net/Files/2012/02/03/1328274833545.pdf>

**Annex. List of officials and people interviewed in Lebanon (October 2012)**

1. Mr. Abdel Hady Mahfouz, Chairman of the National Audiovisual Council (NAC)
2. Mr. Haris Bassil, Director of the Lebanese Film Archive Department, Ministry of Culture
3. Dr. Imad Hoballah, Head of the Technology Telecommunication Unit, Ministry of Telecommunications, Chairman (AREGNET) Arab Regulators Network for Telecommunications & Information
4. Ms. Maya De Freige, Chairwoman of the Foundation Liban Cinéma (FLC)
5. Mr. Ramzi Jubayli, CEO, Future TV
6. Mr. Oussama Rifahi, Chairman, The Arab Fund For Arts and Culture (AFAC)
7. Ms. Rima Mismar, Film Programmes Manager, Arab Fund For Arts and Culture (AFAC)
8. Mr. Georges Shokeir, Director General, ABBOUT Productions
9. Mr. Chrétien Eid, Production coordinator, ABBOUT Productions
10. Mr. Hady Zaccak, Producer and director of Zaccak Productions
11. Mr. Jean Tufenkji, Business Development Manager, MTV & StudioVision
12. Mr. Mario Haddad, Chairman, Empire International Offshore
13. Mr. Bassam Eid, Product Manager-Theatrical Coordinator, Empire International Offshore
14. Mr. Jad Abi-Khalil, Director of DOCmed programme
15. Ms. Rola Kobeissi, Coordinator, DOCmed programme
16. Ms. Najwa Yaacoub, Director of the National Account Department, Central Administration of Statistics (CSA)
17. Mr. Paul Chucrallah, Executive Director, Technological Centre of Berytech
18. Ms. Noha Darwich, Programmes Manager, National Broadcasting Network (NBN)
19. Ms. Sady Farah Executive Assistant to the CEO, Télé Liban
20. Ms. Dina Kreill, Director, Cliché Vert (Los Angeles - Beirut)

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