Identity Matters: The Cultural Logics of Animation Production and Distribution in the Arab World

OMAR SAYFO
Utrecht University, The Netherlands
Avicenna Institute of Middle Eastern Studies, Hungary

Though animation production in the Arab world started in the 1930s, it was not until the 2000s that homegrown films and series gained momentum on the national, geolinguistic, and cultural markets. This article provides an introduction into the cultural logics of homegrown animated cartoon production and distribution in the Arab world, a geolinguistic region, and the Muslim world, a cultural/religious region. Doing so, the article traces the global technological trends and individual struggles, as well as economic considerations, identity-based networks, and government policies that affected media productions and distribution.

Keywords: Arab Animation, Arab Television, Arab Media Industries, Animation production

In March 2020, Arab animation gained momentum like never before as Netflix acquired *Masameer the Movie* (Nejer, 2020). Produced by Myrkott, a Saudi animation studio based in Riyadh, the film tells the story of a local girl with a passion for robots and artificial intelligence, and her three friends, who venture out to prove themselves to society by becoming crime-fighting superheroes. In the history of Arab animation, it was the first time a fully homegrown show was acquired for global distribution, reaching beyond the geocultural borders.

The technologies of animation production were developed mainly in Western countries, which then established dominance in the worldwide distribution of high-quality content. Since the Arab world had long been a periphery in the flow of technology, access to expensive and labor-intensive celluloid and computer-generated imagery (CGI) animation technology posed obstacles for potential Arab producers. Therefore, even though Egypt released its first animated cartoon as early as the 1930s, it took until the spread of 3D animation in the 2000s for Arab animation production to undergo considerable growth both in quality and quantity. While Arab animated films and series are fighting uphill battles against high-quality, cheaply dubbed foreign shows on the home turf, the demand and supply of culturally relevant homegrown content are increasing, and a growing number of producers are willing to invest in the creation of original shows (Sayfo, 2014, 2021; Van de Peer, 2017).

Omar Sayfo: o.a.sayfo@uu.nl

Based on relevant literature of production studies and interviews I conducted between 2012 and 2020 with retired and active animators and producers from Egypt, Tunisia, Algeria, Syria, Jordan, Iraq, Lebanon, Saudi Arabia, and the United Arab Emirates, this article aims to provide an introduction to the cultural logics of the production and distribution of homegrown animated cartoon content in the contemporary Arab Middle East.

Most Arab animated cartoons, both series and feature productions, have been reaching audiences via television, while a smaller but still significant number of viewers access them online, by purchasing DVDs, or, recently, through streaming services. Only a fraction of feature-length productions and short films are presented in cinemas, mostly during film festivals. Therefore, particular attention needs to be paid to the role of television networks as producers and distributors of animation.

This article aims to answer the question: How do cultural particularities of Arab animated cartoon production and distribution disturb Western notions on cultural industries? Animation production is strongly linked to technologies; thus, I will first describe how the technological evolution of animation production facilitated the geographical spread and fragmentation of production from the perspectives of Arab producers. While production and distribution networks have expanded to the global level, cultural/media production and distribution still operate within governmental frameworks. Therefore, in the second section, I explain the role of government involvement in facilitating the establishment of production bases, highlighting the cultural and political particularities of the Arab world in this respect. Producers are key figures who navigate complex sociopolitical systems that define production. By applying social network theories, I show how the role of producers differs from their Western counterparts insofar as it is heavily reliant on interpersonal relations. These networks are especially important when it comes to navigating the institutional actors involved in the making of an animation. Finally, I discuss the various structural levels of Arab animation production and distribution. In an Arab context, we need to widen our analysis beyond the national level, especially in view of the fact that as a geolinguistic region, the Arab world is home to a number of media production and distribution networks (Sakr, 2007a, p. 2). This research expands the scope of investigation to the Muslim world as a cultural region in which Arab animation gained momentum in the last decade. All these aspects are interconnected and overlapping, but ultimately have led to a growing transnational scene of high-quality animations.

Understanding the complexities of the animation scene in the Arab world will give us insight into the dynamics of the cultural and media industries of the Arab world as a geocultural region, described by informalities, strong networks of patronage, political links, (self)censorship, and transnational and transregional networks based on shared identities.

Technological Trends and the Geographical Expansion of Arab Animation Production

The Frenkel brothers, the first animation producers of Egypt and the Arab world in the 1930s, used celluloid technology, as did many others from North African and Middle Eastern countries until the 1980s. This early method made production fundamentally local, determined by the physical location of equipment, while transnational projects were restricted to occasions when Arab animators traveled and gained experience abroad.

        The beginning of the geographical expansion of production is strongly linked to the global advent of CGI starting from the 1960s. This modeling stage is a labor- and talent-intensive process that requires bigger budgets than traditional celluloid animated films (Robertson, 1998). Although CGI production relies on computer graphics, it still requires several artists with manual dexterity as well as computer skills (Crawford, 2003, pp. 110–130). CGI technology reached the Arab world only in 1988, when Mona Abul-Nasr established Cairo Cartoon and set up her own studio in the Egyptian capital. As most producers were lacking resources and trained labor, doing so was beyond reach. Therefore, those who had eligible financial means and wished to create their own feature-length shows and series had to move the entire production process to technologically more advanced countries and, as the means of communication were slow, often also traveled there to maintain control over the texts. One case in point is *al-Amira wal-nahr* (*The Princess and the River*; al-Yasseri, 1982), a propagandistic feature-length production of Saddam Hussein's Iraq. While scriptwriting and dubbing were performed in Iraq, the entire production process was moved to East Germany. Another example is the Joint Program Production Institution (est. 1976), the media project of the Gulf Cooperation Council, which signed with Dana, a Hungary-based studio run by two Iraqi animators to prepare shows like *Za'toor* (al-Zaidi & Faraj, 1995). During the same period, Osama Khalifa, a Saudi producer and owner of Ella Endowment for Art Production, moved to Istanbul and signed up with a local studio to prepare feature-length productions about renowned characters of Islamic history.

        Speaking about film, both producers and the public view reaching international (Hollywood) standard as the ultimate goal (Higson, 1989). This argument is even more valid in the case of animation, a format whose standards of visual and narrative quality have been continually raised by Disney as well as by Japanese animations. The overwhelming majority of Arab animations produced both by celluloid and CGI technologies lagged well behind foreign imports regarding quality; therefore, until the spread of 3D technologies in the early 2000s, even when targeting domestic and regional niche markets, Arab animations' ability to compete with Western and Asian productions remained limited, even on home turf.

        Advances made in computer technologies in the 1990s led to the spread of 3D animation programs, which made use of computer power and algorithms to render precise outlines, colors, textures, and other aspects of the form. Compared with traditional CGI animation, 3D is a less labor- and talent-intensive industry, and equipment has become cheaper and easier to access from year to year (Tschang & Goldstein, 2004). The change in global trends of technology offered Arab animators and producers an opportunity to catch up to countries with long traditions in animation. Since the late 1990s, several animation studios were established in traditional centers of media productions such as Egypt and Syria, and also in newcomers such as Jordan and the Gulf States (Sayfo, 2017). Unlike previous attempts at 2D animation, native Arab 3D and new 2D works prepared by advanced software visually stand up to Western cartoons. To local productions, this means increased chances to achieve popularity among older and younger audiences alike, which also helps producers gain funding and approval of decision makers. At the same time, the proliferation of satellite channels in the 1990s, followed by the boom of thematic children's channels in the early 2000s, also increased the demand for homegrown animation productions (Sayfo, 2015).

        The production process of 3D animation, coupled with the advances of communication technology, facilitated the emergence of transnational production networks. Producing animated cartoons consists of four main stages: conceptualization, preproduction, production, and postproduction (Winder & Dowlatabadi,

2011), to which some scholars add distribution as a fifth stage of the production process (Krätke, 2002). The conceptualization process starts with defining the basic ideas, followed by the preparation of the script, which details the general concept and main elements such as scenes and characters. Preproduction primarily covers the production of models according to the concept, script fleshed out in models, storyboards, and, finally, story reels (Winder & Dowlatabadi, 2011). The production stage of animation includes developing the specifications, visual effects, background paint, and ink and paint, as well as modeling and animating characters, including all colors, textures, and styles (Winder & Dowlatabadi, 2011). In the case of 3D animations, the last stage, postproduction, consists of sound effects, the final music score, sound mixing, and color correction (Tschang & Goldstein, 2004).

One highly significant factor in the growth and regional shifts of homegrown animation content was the possibility of outsourcing (Cole, 2008). On the global level, animation outsourcing was largely driven by economic considerations and was directed from the center, such as the United States, France, and Japan, to peripheral countries with low labor costs such as India, China, and South Korea. Meanwhile, in the Arab world, outsourcing became a strategy of affluent producers of countries with insufficient capacities and know-how, like Saudi Arabia and other Gulf countries, to create their own high-quality animation with the assistance of studios abroad. For such producers, meeting global standards remains a matter of prestige, as the cases of the exclusive shows of Qatari Al Jazeera Children's Channel (JCC, rebranded to Jeem TV in 2013) and *Freej* (Harib, 2006–2013), the first high-quality Emirati sitcom animation, and many others show.

The Role of Government Policies in Arab Animation Production

Despite the emergence of transnational networks, Arab media and cultural production are still strongly tied to the national level, where politics set the frames of operation. Regardless of country of origin, all Arab animation producers I interviewed agreed that "governments do not support animation." Indeed, not counting occasional orders for animated educational and politically loaded spots, Arab governments are barely interested in the animation scene. Still, producers are tied to countries both when setting up base and when receiving contracts for production; therefore, government policies regarding cultural production are highly pertinent. Arab government policies toward cultural and media production depend on both predictable and unpredictable factors.

The first predictable factor in government policies toward cultural/creative industries in general, especially animation production, is economic. A particularly important aspect in this regard is the size of the local market, which has traditionally meant a great advantage for Egyptian producers since the early history of Egyptian cinema and television. The number of national consumers made Egyptian cultural industries relatively independent from other Arab markets. Egyptian cinema and television productions, however, quickly swept beyond the national borders and became popular in the entire Arab geolinguistic market. Since Egypt already had established cinema and television industries, animation studios in Egypt were set up as early as the 1930s, long before they appeared in other Arab countries. The vast majority of Egyptian animated cartoons (with the exception of some Islamic productions) has been seeking popularity primarily among national and only secondarily among regional audiences, as shown by the fact that a great number of Egyptian animations use local cultural markers regarding both dialect and visual scenes, and in some cases, they even have political agendas. On the other hand, market size alone does not automatically result

in a liberal market for productions: Animation producers rely on their interpersonnel connections to decision makers at television channels to receive orders for their products.

The second factor, the available financial resources, whether from governmental or private sources, is also crucial to developing animation production. Economic conditions generally determine technological possibilities by enabling or restraining cultural development. Generous funding can compensate for market size if it guarantees to cover the costs of production, as in the case of Saudi Arabia and the Gulf, where Osama Khalifa's private company, Ella, has been able to produce more than a dozen feature-length animations since the mid-1990s. Similarly, the availability of financial resources enables producers from Saudi Arabia, Kuwait, Qatar, and the UAE to create higher-quality animations than producers from larger Arab countries. At the same time, as they are not financially dependent on other markets, producers from the Gulf are able to cater to the national market only.

Government policies toward cultural and creative industries represent the third predictable factor for creating animation production. Creative industries, including animation industries, are largely dependent on regulations by the state. Liberal entrepreneurship regulations can provide opportunities for producers to establish their businesses. Because of its well-established media industries, Egypt quickly rose to become the center for animated cartoon production in the Arab world. In the early 2000s, many Egyptian start-up animation studios were established, and advanced production companies decided to produce animated content either by founding their own studios or by subcontracting with new animation companies. From the early 1990s onward, several Arab governments introduced economic reforms that paved the way for the creation of new production houses and animation studios. In Syria, the 1991 investment law encouraged private-sector entrepreneurs to develop television programs for commercial entertainment (Salamandra, 2004). The Jordanian government's initiative to build a knowledge-oriented society, with special emphasis on information and communications technology, promoted the creation of several private media and production companies (Djeflat, 2009). Meanwhile, the most sweeping reforms took place in the Gulf region, particularly in Dubai, where the government implemented liberalizing economic policies designed to turn Dubai into a free market economy. As part of the cluster-based development strategy, Dubai Media City was established in January 2001 to turn Dubai into a regional media hub (Sakr, 2007a).

The fourth factor that affects Arab animation production is political. In the 1990s, Egyptian government institutions provided generous support for local producers of eligible personal and professional networks to preserve and boost Egypt's cultural dominance in the Arab world (Sakr, 2007b). Similarly, governments with long-term visions and policies of nation-building such as Baathist Iraq and Syria, but also Jordan, the UAE, and Saudi Arabia, had been more willing to invest in animation productions than countries without such policies. The support does not go to creative industries in general, but to specific producers and productions with adequate networks and the expectation to stay politically conformist. The producers of high-budget animations usually maintain close ties with their respective governments. Baathist Iraq's sole feature-length animation production, *The Princess and the River* (al-Yasseri, 1982), was produced by Babylon, an Iraqi state-funded company (Shafiq, 2007). The Gulf Cooperation Council's' Joint Program Production Institution (JPPI) was established in 1976 with an aim to synchronize participating countries' national television and promote a common Gulf identity among the people of the GCC. It received a strong budget from funding governments to produce children's content, including animated cartoons. Similarly, an

exclusive series of well-funded pan-Arab children's channels with close ties to their states, such as Saudi MBC 3 and Qatari Jeem TV, regularly sign contracts with production houses and animation studios to produce exclusive animated series. In 2016, Al-Jazeera-owned Bein Media Group purchased Miramax, an American entertainment company with a decade-long experience in quality animation production, providing Jeem TV with an opportunity to release high-quality original content. In response to the dominance of regional powerhouses, in 2015, Abu Dhabi Media, the official media organization of the government of Abu Dhabi, set up Majid Entertainment, which launched Majid TV, an animation channel, with a goal to address a national audience. Similarly, in 2017, Saudi Arabia's Manga Productions, a company affiliated with Saudi Crown Prince Mohammed bin Salman's MiSK Foundation, teamed up with Japan's Toei Animation to produce animation titles and films to be released in both countries. The first show was *The Journey* (Shizuno, 2021), set 1,500 years ago in the city of Mecca, telling the story of Aws and the people of Mecca who are forced to take up arms to liberate their city from enslavement. To be sure, the plot includes allusions to today's Saudi tensions with Iran.

There are also unpredictable factors in government policies toward actors of cultural/creative industries, like personal preferences and the priorities of decision makers as well as the personal networks of producers that have the potential to influence decision makers.

The Producers and Their Teams

From the 1920s to the 1980s, two major artistic and business models dominated the global animation scene: the globalized Hollywood system and artisan-style animation (Salais & Stoper, 1992, Yoon & Malecki, 2010). The globalized Hollywood system has been largely associated with American studios that focused on market appeal when intended for theaters and on cost and schedule when aimed at television. In contrast, artistic quality was the main priority for artisan-style animation such as Japanese anime and European animation. In the case of many European countries, artisan studios were subsidized by national governments, while American companies operated as business enterprises. In both cases, the primary markets for animated films and series were theaters and cartoon blocks in television channels (Yoon & Malecki, 2010).

Arab animation production before the 2000s shared many traits with artisan European animation despite its limited financial resources. Since animation production alone was not profitable, it was common for Arab animators between the 1930s and the 1970s to prepare their projects individually or in small workshops while working "day jobs" in local television or cinema industries. Although these animators have enjoyed professional freedom, their positions were economically delicate, and a dichotomy between creative and economic motivations began to emerge. While most animators successfully used their networks to have their works presented on television, some short productions were also presented in cinema and at festivals. Still, many productions did not succeed in reaching larger audiences and did not generate profit either. According to my interviews, the prospect of profit is still hollow for many producers.

"If we wanted to make money, we would have done TV commercials," Mustafa al-Faramawi, producer of high-profile Egyptian Islamic cartoon series, stated when I asked him about his motivations for making animated cartoon series. Reading interviews and talking to producers across the Middle East and

North Africa, I observed what Ortner (2013) terms a "discourse of passion": Producers generally distinguish between commercial projects they make profit with and passion projects in which they find personal fulfillment (pp. 34–38). In many cases, they use the financial sources gained from commercial projects to fund less-profitable works, a phenomenon not unknown in the United States and Europe, and also similar to Syrian television drama producers' "one for the money; one for the art" approach in the 1990s (Salamandra, 2019, p. 126).

Still, passion is not always enough. "I am a great admirer of Walt Disney in terms of quality and professionalism," Mustafa al-Faramawi continued. "My ultimate aim is to tell Arab and Muslim children about their own culture in the highest quality possible." This notion, which I call "discourse of identity," is a returning trope in interviews with producers and the official descriptions of projects and is strongly linked to the strategies of targeting national, regional, and transregional niche markets the producer sets an eye on. Additionally, it also helps forge identity-based networks of production and distribution.

In the case of Arab animation, the producer's role differs from its Western counterparts. While large Western animation studios and production houses display a sometimes-strong separation between creative leadership and organizational management, in the context of small-scale Arab studios, the distinctions between these roles often overlap. Eventually, this is a characteristic that the otherwise locally diverse cultures of Arab animation production generally share regardless of location, time, and technology.

Depending on their individual characteristics and professional backgrounds, Arab producers assume various primary capacities in the project, such as CEO, producer, director, animator, and writer. A producer's enforcement of authority depends on negotiations of control, individual attitude, and power relations among the participants. Most important, they act as "principal gatekeepers" and have the final decision when problems arise (Newcomb & Alley, 1983, p. ix). Practically, Arab animation producers are primarily concerned with funding negotiations, obtaining distribution deals, and securing the necessary services to undertake a project and create a sustainable model both for production and distribution.

The producers act as the central figures in social and professional networks facilitating production and distribution. Powell and Smith-Doerr (1994) recognize three main arenas in which informal social networks are markedly important: employment and recruitment, the diffusion of ideas and policies, and the mobilization of resources. Because of the general lack of professional animation education in Arab countries, the pool of available animators has been historically small. Therefore, to find skilled labor, producers traditionally relied on effective networks. Likewise, potential donors have been reluctant to invest in productions that were regarded as childish and overpriced compared with live shows and cheap imported animation content. For such obstacles, Arab animation producers' source of authority and prestige among others stems from their capacity for generating resources for production, ability to recruit labor and access to equipment, and ability to facilitate distribution. Therefore, the success and prestige of individual Arab animation producers depend partly on the network of production and also the network for distribution. Very often, both are informal networks of social relations operating across various scales, including the local, the national, the geocultural, and the global.

Most producers I have interviewed were reluctant to disclose their personal networks, which poses a certain limit to the analysis, and instead engaged in the above-mentioned discourse of passion and identity. Still, they generally agreed that personal networks and interpersonal relationships on the national and the geocultural scale of production and distribution are, unlike in the West, as we will see later, more important than interfirm relationships (Sayfo, 2017, 2021). Indeed, funding and distribution agreements often depend on personal networks and patronage systems rather than on institutional agreements. Decision makers at television channels and potential funders tend to sign contracts with producers they personally trust, those who are informally endorsed by influential individuals of various capacities, and those who are well embedded in prestigious social and institutional hierarchies.

It is striking to see that producers of high-profile animation have strong links to decision makers and are embedded in existing networks in politics and/or media industries. Mona Abul-Nasr, producer of *Bakkar* (Abul-Nasr, 1998), one of the first Egyptian/Arab CGI animation series, had close ties to then-first lady Suzanne Mubarak (Gelal, 2017; Nasser, 2017). Meanwhile, Syria's Tiger Production, the producer of quality feature-length productions such as *Khayt al-hayat* (*Yarn of Life*; Hijazi, 2007) and *Tuyur al-yasmin* (*Jasmine Birds*; Hijazi, 2009) was established by children of Abdel-Nabiyy Hijazi (1938–2013), who served as director of the General Organization of Radio and TV between 1988 and 1996. Jordan's highest-budget animated series, *Ben wa ʿEssam* (*Ben and Izzy*; Chaika, 2008), was produced by Rubicon, a multimedia production company founded by influential businesswoman Randa Ayyoubi and funded by the King Abdullah II Fund for Development.

For newcomers, personal links, or at least recommendations, in Arabic *wasta* (Cunningham & Sarayrah, 1993), of influential individuals are essential to get noticed by decision makers. One case in point is the above-quoted Mustafa al-Faramawi, who benefited from the networks of his mentor, Mona Abul-Nasr, when establishing Niletoon, his own company, and signing a partnership with Egyptian television. In the case of producers of feature productions aimed for cinematic and/or DVD distribution, like Osama Khalifa and his Saudi compatriot Ajman Jamal, who set up a company in Dubai to prepare *Bilal* (Jamal & Alavi, 2015), strong links, or *wasta,* are also fundamental when seeking financial sponsors. In many cases, the quality of production and a company's portfolio alone can be eligible to find partners for funding and distribution. This was the case of Jordanian Sketch in Motion Studio, which signed up with Saudi MBC Group to create a series of *al-Masageel* (Zaidan, 2011–2013), revolving around a Bedouin tribe, hence culturally relevant for the Saudi channel, hungry for original content.

Workers in cultural industries generally enjoy a great deal of autonomy, largely because the originality of their products is essential for market success (Banks, 2010; Hesmondhalgh, 2013). For Coe (2000), animation production is the ambiguous balance of creative freedom and commercial risk that can be linked to "mutually constitutive" relations between the culture and economy of media work (p. 391). While this observation is certainly valid for Western cultural industries, Arab cultural and even creative industries are considerably less liberated. Creative freedom is often constrained by the expectations of censors and decision makers, as producers eventually rely on patronage and connections both to formal and informal players in local and geolinguistic media industries. The necessity to gain and maintain the trust of decision makers often leads to self-censorship, a widespread phenomenon in Arab cultural and media sectors. The costly nature of animation production reduces the willingness of producers to take

risks even further. As animating additional scenes is more expensive than shooting a scene of similar length for live productions, animation producers carefully vet the ideas and scripts well before animating work even begins. Arab animation producers, however, still have some limited freedom to form the identities of the texts. To be sure, their limits and opportunities largely depend on the geographical scales of production and distribution.

Structural Levels of Arab Animation Production

Even though Arab media in general and television in particular are still largely linked to the national level in terms of regulations, production is no longer tied exclusively to local (national) production structures owing to the technological advances and the overall globalizing tendencies of television industries. With the formation of new structural boundaries, regional and local producers receive new material (finance and technology) and symbolic resources (ideas and models) to work with (Straubhaar, 2009). Also, geographically distant actors are able to sign up project-based and long-term partnerships. In structural terms, globalization means an "increase in the available modes of organization: transnational, international, macroregional, national, microregional, municipal, and local" (Pieterse, 1995, p. 50).

Arab animation has several levels of operation, production, investment, distribution, flow, and impact. However, I suggest that there are three most dominant structural levels: the local (national), the regional (geolinguistic), and the global, the latter divided into two additional subcategories: one within and the other beyond the Muslim world. Even though authorship is the most determining factor regarding the identity formation of a production, the structural background of a production and the identity of the text are often inextricably linked. In other cases, transnational production networks open the gates for a wider distribution of productions, while the targeted market broadly defines the identities articulated by the text.

In particular cases, identity-based networks of production emerge. I apply Hite and Hesterly's (2001) notion of identity-based networks, where "some type of personal or social identification with the other actor motivates or influences economic actions" for a transnational Arab and Muslim scene (p. 278). Many producers I interviewed declared a preference for Arab/Muslim labor when choosing partners, pointing out cultural understanding and easy communication during the work process (Abbas Abbas, personal communication, September 10, 2012; Mohamed al-Mazen, personal communication, September 6, 2012; Osama Khalifa, personal communication, May 15, 2014; Omar Maghary, personal communication, September 14, 2012; Tarek Rashed, personal communication, September 8, 2012). Among those who benefited from this preferential treatment is Egyptian animator Tarek Rashed, whose studio received several orders from Kuwaiti, Omani, and Emirati producers in the early 2010s. Many well-off producers from the Gulf regard quality as a matter of prestige, and therefore partner up with reputable animation companies located outside the Arab world to countries like India, the Philippines, and Malaysia. This approach resembles Williamson's (1993) notion of calculative networks, where the focal actor's ties are primarily motivated by expected economic benefits.

Speaking about Muslim identity, Ella's owner, Osama Khalifa, explained to me that he contracted with a Turkish animation company for his feature productions revolving around Islamic history, as he believed that Muslim artists have a better understanding of cultural nuances than non-Muslim ones. On the

practical side, Turkish involvement in the production also served as a gateway to the Turkish market, as Ella's first production, *Mohammad al-fatih* (*Mohammad the Conqueror*; Khalifa, 1995) tells the story of the conqueror of Constantinople (modern-day Istanbul), who brought an end to the Byzantine Empire and is considered a hero in modern-day Turkey. Although Ella productions claim a universal "Islamic identity," the fact that the owner and producer is a Sunni Muslim from Saudi Arabia together with some textual markers, like the exclusion of instrumental music (considered un-Islamic by conservative Wahhabism), gives the productions a specific Sunni Islamic identity.

Similarly, Meem Cultural Production (est. 2016), a Lebanese studio run by Abbas Sharara, who, according his accounts, has a personal history with the Imam al-Mahdi Scouts, a youth movement established by Iran-backed Hezbollah, regarded it as a natural choice to contract with an Iranian animation firm to produce his feature productions the *Princess of Rome* (Jafari, 2015) and *The Elephant King* (Jafari, 2017; Abbas Sharara, personal communication, January 8, 2020). The first film narrates the tale of Melika, a Roman princess who becomes the wife of Imam al-Hadi'. A feature about a highly respected figure of Shia history opened Iranian and other Shia niche markets while the gates of Sunni markets largely closed.

Meanwhile, calculative networks of production formed in the case of Bilal, as producer Ayman Jamal aimed to enter a highly competitive international market with a high-quality show; therefore, his Dubai-based company's crew was made up of more than 327 people of 24 nationalities, many of whom had previously worked for DreamWorks, Pixar, and other Hollywood companies (Vivarelli, 2015). Such considerations echo the discourse of identity on a practical level as producers aim to create culturally relevant products by turning to spaces in which they can use a "cultural shorthand" in communication.

Animation as a creative business is inherently unpredictable and therefore risky (Hesmondhalgh, 2013, p. 27). This risk largely depends on decisions made throughout the cycle of production, distribution, and consumption (Bilton, 1999). Large American networks like Disney and TNT are able to balance the risks of economic and commercial failure by bringing in a wide repertoire of productions and distributing them across global markets. This is not an option for most Arab producers, as they lack infrastructure, labor, and financial resources to roll out more than one or at best a handful of productions at a time. Producers generally regard patronage of high potential to reduce economic risk; therefore, they are extremely wary not to damage their personal networks by critical failure, especially if fueled by political and religious issues that could risk their relations with patrons.

Even though globalization theories tend to highlight the importance of global actors in media production, the nation-state remains the dominant structure on both the political and institutional levels. States structure most ground rules of the media, starting from market structures, ownership rules, production incentives and subsidies, financial rules, frequency assignments, technical standards, and content rules that have the largest impact on the microlevel (Sakr, 2001, p. 66). In the case of Arab television, states and state-related institutions dominate broadcasting both on the political and institutional levels. Thus, states also set the frames for microlevel actors such as production companies and animation studios. Networks of patronage define production on a high level, and so do the links between micro- and macroactors. While many microactors in the Arab animation industry are private companies and individuals, market power is rarely handed to independent actors. In this context, cultural productions are "appendages

of the ruling political and economic order in the Arab world, not challenges to it" (Sakr, 2007a, p. 2). This remains a characteristic of today's mediascapes (Freemuse, 2020).

Since television remains a primarily national phenomenon, the institutional background of production, and hence the production itself, is affected by several economic, political, and socioeconomic factors. As actors of local media systems, Arab animation producers operate within the framework set by governments—either their own or of the channels with which they sign contracts for production. Animation producers also rely on television channels, generally connected by institutional, economic, or personal ties to governmental institutions, to receive concessions for production and to air their products. In this regard, television channels act as mediators between actors of the micro- and the macrolevels. Power relations are taken into consideration by producers, even though the vast majority of Arab animation and production companies as well as animation studios are private enterprises. Most of the animators and producers I interviewed admitted that besides fulfilling personal artistic ambitions, their goal was to create a sustainable business, which certainly called for a consideration of the priorities and sensibilities of television channels that usually maintain formal or informal links to political players.

Arab animation industries mostly consist of shifting networks of firms of various sizes and life spans spread across an indistinct and expanding geography. It is also common for Arab animators to follow jobs from one country to another. Some studios I visited in Egypt (like al-Shahar) and Tunisia (like CGS) also hire talents from neighboring countries. Meanwhile, well-off production centers in the Gulf are hubs not only for Arab but also international labor, as the national diversity of the employees of production houses in the Gulf reflects the multicultural societies in which they live, as we saw in the case of the production team of *Bilal*.

Emerging regional production networks offer new opportunities for potential Arab animation producers to find partners beyond the national pool. As a result, limited human and infrastructural resources on the micro(local)level no longer constrain local producers if compensated with networks to other countries and with hubs and sufficient financial resources. Following the global trend started by Hollywood in the 1950s, Arab animation industries consist of vertically disintegrated production systems, characterized by subcontracting between firms of different sizes and growing networks of smaller firms, defined by producers and animation studios temporarily collaborating around specific projects. As mentioned before, this practice made casual deal making, often led by personal preferences, a deciding factor. My interviewees, too, stressed the central roles of traditions and informal and personal networks in forming the market for Arab animated cartoons (Abbas Abbas, personal communication, September 10, 2012; Mohamed Elmazen, personal communication, September 6, 2012; Mustafa Al-Faramawi, personal communication, September 6, 2012; Sulafa Hijazi, personal communication, December 13, 2013; Osama Khalifa, personal communication, May 15, 2014; Omar Maghary, personal communication, September 14, 2012; Tarek Rashed, personal communication, September 8, 2012; Thamer al-Zaidi, personal communication, October 12, 2014.) In this regard, the producer's role is fundamental.

While in a Western context regional clusters and their resources are significant preconditions of project organization, in the case of Arab animation production such geographical proximity is less defining (Hesmondhalgh, 2013). To be sure, both Cairo (since the 1930s) and more recently Dubai (since

the early 2000s) have emerged as hubs of animation production; still, partnering production houses and studios are often located in distinct parts of the city. Similarly, prewar Syrian animation production studios were scattered in distant parts of Damascus, while in today's Amman, only around half of the animation and production companies are located in the King Hussein Business Park. Still, the spatially extended "project ecology" of Arab animation industries shares many similarities with the tightly agglomerated clusters that occupy much of the literature on the geography of cultural industries (Cole, 2008).

Like the production, the distribution of Arab animation takes place in a geographically expanding space, shaped by personal networks and shared identity.

Distributing Content Locally, Regionally, and Globally

The governance of animation production is generally dictated not only by the producers and institutions that control whether content is produced but also by those who decide how it is distributed (Tschang & Goldstein, 2004). In the case of American animation, the two aspects are increasingly connected as the distribution of content is often controlled by major television channels, which also act as producers. Similarly, in the Arab world, television channels provide the primary platforms for distribution. Meanwhile, several animated cartoon production companies originally established their businesses with the creation of films and TV series and use their networks effectively for distributing their animated content. Still, no single producer in the Arab world commands a regional authority and influence comparable to Disney's. Therefore, newcomer production houses and animation studios either focus on the distribution of flagship projects or sign with companies specializing in distribution.

In a market dominated by quality American and Japanese animation that can be cheaply dubbed, Arab producers are targeting niche markets by creating culturally relevant content on the national, pan-Arab, and Islamic levels of distribution. Such mediated identities largely define prospects and scales of distribution, which are usually one-way flows from the broader and inclusive identities to the particular ones.

Transnational flow of Arab animation should be set to the global trend of the late 20th century, the regionalization of television into multiple country markets linked by geography, language, and culture. These markets can be called geocultural or cultural linguistic markets rather than regional markets since not all of them link populations, markets, and geographically contiguous cultures (Wilkinson, 1995). Markets of this type are usually centered in particular countries or geographic regions, and they are primarily unified by language, even if dialects differ from one subregion or country to the next. In addition to language, people are also bound by history, religion, ethnicity, common cultural values, family structure, living patterns, and identity. Geolinguistic markets emerge owing to the demand of local audiences for cultural relevance (Straubhaar, 2007).

The Arab world is a geolinguistic region where—besides culture and religion—common language is a primary unifier among those living in distant geographic locations. Both Egypt and later Syria traditionally produced content to serve the entire geolinguistic region. With the expansion of Arabic satellite networks in the 2000s, they reached their zenith (Salamandra, 2019). Similarly, Arab animations have the potential to

create a "cultural discount" as they are "rooted in one culture and thus attractive in that environment [but] will have a diminished appeal elsewhere as viewers find it difficult to identify with the style, values, beliefs, institutions, and behavioral patterns of the material in question" (Hoskins & Mirus, 1988, p. 500). We see that productions dubbed in the widely understood standard (*fusha*) Arabic, especially if their topic is inspired by Arab literature or history, easily find their way to other countries' markets. Still, the primary market of the production could potentially disturb the flow to other markets if the text includes too many specific national references. Therefore, most producers prioritize their focus on one specific market rather than take bold chances in playing for multiple markets at once.

Straubhaar's (2007, 2009) observations on the local demand for culturally relevant productions seem to be valid not only on geolinguistic but also on cultural (Islamic) markets, as shown by the immense popularity of Turkish soap operas in the Arab world (Kraidy & al-Ghazzi, 2013). Such Islamic contents contribute to the emergence of "regional media spheres" (Kraidy, 2005, pp. 99–100), which trouble Western notions of transnational media flows and audience segmentation. In line with Wilkinson's above-mentioned observations, Islamic markets are not necessarily geographically connected, and shared identity is more defining than location. Similarly to Japanese animation, they should be considered attempts "to attend simultaneously to the homogenizing forces of globalization and to transformative local practices in the formation of non-Western indigenized modernity" (Iwabuchi, 2008, p. 40).

Still, there is a significant difference between Japanese and Arab Islamic animation, as the former generally lacks the signification of substantially Japanese ideas and identities since being presented as "neutral" is one of the key factors of its transnational flow (Iwabuchi, 2008, p. 49). In contrast, Arab producers of Islamic animations have an outspoken "discourse of identity," which provides opportunities but also poses limits for their flow because of the religious, cultural, and political fragmentation of Islamic markets. Many of Osama Khalifa's films were dubbed to Turkish and Urdu and distributed beyond the Arab world; however, they faced trouble in reaching Shia markets. Similarly, the films of Lebanese Meem Production were distributed mainly in countries with significant Shia populations and European countries with Shia diasporas while remaining absent from large Sunni markets like Egypt, Saudi Arabia, and Malaysia. Meanwhile, as the religious authority of Egypt's main religious institution, Al-Azhar, whose approval is crucial when creating local religious media content, Egyptian Islamic animations like those created by Mustafa al-Faramawi are regarded as less controversial and politically less motivated than those of Iranian and Saudi Arabian productions. Therefore, they are successful in reaching Muslim markets as far as India and Malaysia and are distributed both for Shia and Sunni audiences (Sayfo, 2018).

To avoid the fragmentation of Arab/Muslim markets and to appeal to several markets, *Bilal* (Jamal & Alavi, 2015) was framed as a story about humanist values and proved to be attractive mainly for markets sharing Islamic identities. Among a number of Muslim countries, it also was screened in front of African-American communities partly attributed to the fact that the hero's historical character, a freed African slave who becomes a famous warrior, is of great symbolical value for many (Curtis, 2005).

In all cases, we see that shared religious identities and shared concern about a perceived cultural imperialism represented by Western productions, especially when coupled with firm discourse of identity on behalf of the producers, serve as the base of trust when setting up networks of production and distribution.

These characteristics largely complicate Western and Japanese notions of cultural and media industries. While these productions had moderate success on the non-Muslim global market, they still present the absence of Arab animated cartoons from global, non-Muslim markets.

Conclusion

While the contact between the global (non-Muslim) and local Arab markets could still be described as a one-way flow of foreign technology, trends, and content in the last decades, Arab animation has gained momentum on the national, geolinguistic, and cultural niche markets. Their productions have been mainly led by the desire of local producers to create culturally relevant content, articulated in their "discourse of identity" aimed to convince funders, production and distribution partners, and the audience. Texts are shaped by various factors that include the producer's aims, sponsorships, targeted audiences, distributing channels, and political and economic considerations. Producers' interpersonal networks with decision makers embedded in political and media hierarchies can make or break the success of their productions.

There are three main notions of identities Arab animation aims to mediate when targeting niche markets: the national, the pan-Arab, and the Islamic. Those are highlighted on the textual level and in the producers' "discourse of identity." Identity has a strong potential in formulating networks of production and distribution both on the Arab (geolinguistic) and the Muslim (cultural) scenes. Shared identities—especially when coupled with preexisting social and political networks—can facilitate the emergence of networks of production and distribution, but they also limit access to markets of rival identities.

Arab cultural particularities, as this article shows, differ from and challenge Western notions on cultural industries in multiple ways. Dealing with government controls by navigating through complex systems of patronage, reliance on interpersonal networks on the domestic level, identity-based networks on the international scene, and the role of cultural discount make the production of Arab animation largely different from American and European experiences.

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