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The Business Push and Audience Pull in Arab Entertainment Television

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This article seeks to identify complex dynamics in Arab media. It argues that Arab entertainment television is subject to twin processes of "business push" and "local audience pull." It also illustrates how multiple power structures hinder or facilitate these processes. Using an overview of the past five years in Arab entertainment television, the article analyzes transformative practices that illustrate key fractures in global media codistribution, format television, and media investments, as well as signs of the reassertion of national broadcasters and the impact of the YouTube phenomenon. The article argues for investigating the push/pull vectors that foster links and interactions more than actors and structures. This approach is required to better understand current global media permutations.

Keywords: Arab, television, global media, localization, format TV, entertainment, audiences, YouTube

In 2015, a study involving 6,000 face-to-face interviews across the Arab world suggested a strong demand for local content while acknowledging its scarcity in media offerings (Northwestern University, 2014). Commenting on these findings, Fadi Ismail, general manager of 03 Productions, a subsidiary of a leading Arab multichannel MBC Group that acquires regional content and also adapts international drama series, confessed that "the worst Arabic drama series will always get higher ratings than the best U.S. series" (Goodefellow, 2015, para. 15). Aside from the qualitative "worst"/"best" assessment, Ismail is rehashing a long-standing argument in television studies that credits popular success to cultural relevance. The subsequent development of this reasoning would suggest that a further localization of entertainment products should yield greater popular success. This is an interesting launching point from which to explore the complex dynamics in transnational/regional and national/local Arab entertainment television.

Indeed, we live at a particular juncture in Arab media history when audiences are increasingly demanding to see and hear from people who appear like them and read about events and developments in their immediate communities. This ought to be seen in association with sociopolitical reforms and

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democratic struggles that have culminated in the Arab Spring (Zayani & Mirgani, 2016). Political power aside, this drive is also associated with economic, social, and symbolic forces that facilitate access to and interest in local media production and reception. The reassertion of the nation-state in the Arab world, with its multiple ethnoreligious identities, is reinvigorating an audience pull. But for these very same reasons—political, social, and symbolic—there continues to be a transnational push on local media, franchising of media channels, and, of course, the franchise and sale of movies, series, and other media products. Two related factors accelerate this push: (1) Many foreign governments want to play a role in influencing the Arab World, and (2) regional and global businesses are eager to develop new markets (e.g., Discovery Networks, Fox, Netflix, and others).

As scholars, we are challenged to make sense of this increasingly complex environment, which is characterized by what I refer to as the twin push/pull processes. I use the word *complex* here consciously, because my articulations of these dynamics run counter to simplified and exclusive economic, geographic, cultural, or political explanations. After all, the most pressing question confronting us may not ever be what these processes mean in specific local, regional, or global contexts, but rather how their overlap, convergence, or collisions disrupt conventional approaches to understanding global media. These latter approaches, particularly cultural imperialism and cultural proximity, are often used as static explanations, disregarding the evolutionary nature of communication practices and processes. Let me preface my argument by suggesting that these evolving processes are not a new phenomenon in global media. Certain trends related to the regionalization of television were observed in the media liberalization/privatization of the 1990s in much of Europe, Latin America, and the Arab world.

In the 1990s and 2000s, the Arab world witnessed widespread "regionalization" of media companies, which offered a shared public space to reveal common entertainment interests in music, film, and television. In line with business logic, media practitioners and researchers tended to lump Arab countries as a homogenized "local," one comprising more than 300 million media users simply because they share variations of Arabic as a language (Hafez, 2008; Mellor, Rinnawi, Dajani, & Ayish, 2013). Many current observers of the shifts in Arab media have already begun to lament the failure of this regionalization thrust, known as pan-Arab media, often laying blame on the economic, political, and cultural powers ruling over media industries (Della Ratta, Sakr, & Skovgaard-Petersen, 2015; Kraidy & Khalil, 2009). Such explanations of failed regionalization overlap with the realization that "[a]udiences want networks to talk in their languages, focus on the genres they prefer, show known names (local stars), and demonstrate interest for their market idiosyncrasies" (Straubhaar & Duarte, 2005, p. 247). As such, a reemergence of national, as opposed to regional, audiences can be seen as symptomatic of what Beck (2000) termed "methodological nationalism," which "subsumes society under the nation-state" (p. 286). In studies of Arab media, the term *local* is often conflated with a regional Arab world, so the question before us remains: As the "local" becomes increasingly redefined as national instead of pan-Arab, what are the key fractures within the push/pull processes?

To address these changing dynamics, this article comprises three main sections. The first involves a summary reprise of theoretical constructs associated with the global production and circulation of entertainment media and notions of media power. The second section amounts to an overview of the state of Arab media with a focus on the past five years, which have been characterized by transformative practices and changes in power dynamics. The third and core section of the article puts forward an argument about how the twin processes of push/pull are reconfiguring power dynamics in Arab media industries. In doing so, it draws, inevitably, on other factors in global media power structures, including (but not limited to) audiences, content, and platforms. The article concludes with a speculative look at the future trajectory of global media permutations.

This examination of Arab media draws largely from a critical political economy approach to the study of media. Recognizing the interconnections between structures of power, this approach is anchored in a sociohistorical perspective that observes changes in media over time and space (Golding & Murdock, 2000). Critical political economy is engaged in providing some stimulating and necessary interventions in existing debates in global television. A five-year period of monitoring industry developments and informal interviews with executives in Doha, Beirut, and Dubai was used in the weaving of this particular analysis of television entertainment, which is believed to be the most popular programming genre in the region (I say "believed" because there are increasing doubts from advertisers and producers regarding audience-measurement practices).

Theoretical Departures

The study of the current Arab media landscape is to be seen within a larger, more inclusive context, framed within broader changes in global media and the structures that support them. To advance the debate, I start by reviewing two influential macro-theoretical constructs before critically engaging with entertainment television and media power structures.

On one end of the spectrum, global media are presented as postnational instruments of power in their forms and structure. For at least five decades, cultural imperialism has provided one of the most influential frameworks through which developments in global media are understood and interpreted (Boyd-Barrett, 2015). It places an importance on the economic, political, and cultural power of media industries that set the quality and quantity of global media flows. Even though audiences prefer proximate content, the "powerful appeal of exotic, non-local programming—including the action, violence, and sex of U.S. movies—has its place on the world's TV schedules" (Elasmar, 2003, p. 80). Even today, cultural imperialism remains "the root of all international legislation to protect indigenous culture" (Elasmar, 2003, p. 13). In sum, the combination of media institutions' economic power and the global reach of their products leads to cultural imperialism.

At the other end of the spectrum, a countertheory suggests that the local has reasserted itself in regional markets. Both Sinclair, Jacka, & Cunningham (1996) and Straubhaar (1997) have argued that media markets have acquired a multilayered structure that involves up to four dimensions: local, national, world-regional, and global levels. Thus, the process of media globalization involves the formation of a second layer that fits in between the national and global levels: the 'geo-cultural' or 'geo-linguistic' region. According to Sinclair et al. (1996), transnational television markets develop based on shared languages, historical experiences, and geographical and cultural proximity. What transpires is that "[E]ach geo-linguistic region, as we can call it, is dominated, in turn, by one or two centers of audio-visual productions" (Sinclair et al.. 1996, p. 2). At the same time, changes in the nature and operations of media markets lead to the emergence of new production genres, such as localized channels or program formats. Both allow global media to recognize cultural diversity and adapt their products to different markets (Chalaby, 2002). In a similar vein, the complex work of Iwabuchi (2004) on the "glocal" television format and a corresponding sense of global modernity is noteworthy, but largely beyond the scope of this article.

Both long-cherished conventions of global television scholarship described above are complicated considerably when we closely examine developments in Arab entertainment television. Approaches that perceive this programming genre as a map of regional domination or as maintaining a one-layer distinction between global and regional production should be reconfigured when faced with a local pull that redefines television entertainment and power. To reconsider these approaches, however, we need to be clear about what entertainment television is, and which aspects of the media/power nexus are being discussed.

Entertainment television is an unusual category in that its title is defined by its ability to give pleasure and delight to its audience, rather than by universal characteristics of the entertainment text. Barnouw and Kirkland (1989) define mass entertainment as an "experience that can be sold to and enjoyed by large and heterogeneous groups of people" (p. 102). Browne (1983) identifies mass entertainment media as "that which appears to have as its primary purpose the amusement, distraction and/or relaxation of its audience" (p. 188). For Zillmann (2000), television allowed for the "democratization of entertainment" (p. 17). And the right to be entertained through television eventually extended beyond the developed world: "[A]s more societies become prosperous, this call is likely to be heard around the world" (Zillmann & Vorderer, 2000, p. vii).

The international circulation of entertainment television production, program genres and formats, and scheduling practices is associated with a number of players in the cultural industries. To understand the nature of these industries, including television, Golding and Murdock (2000) encourage scholars to "explain how the economic dynamics of production structure public discourse by promoting certain cultural forms over others" (p. 84). Yet, these industries, represented by program developers and producers, format licensors, local/regional production companies and distributors, broadcast channels, and others, are not the single determinant in the prevalence of specific forms of television entertainment.

As decades of research in cultural studies and political economy now indicate, entertainment television is not and cannot be apolitical (Gray, 2008; Jones, 2010). Questions of power are part and parcel of the production, distribution, and programming of entertainment television. Thompson (1995) defines power as "the ability to act in pursuit of one's aims and interests, the ability to intervene in the course of events and to affect their outcome" (p. 13). He argues that communication is a purposive social action, a tool to exercise power. Thompson goes on to suggest that there are four types of power: economic, political, coercive, and symbolic. Media fall under the category of symbolic power, and they operate relationally as economic, political, and coercive power, as well.

Indeed, over the past 20 years, the debate concerning Arab media power has revolved around the role of the state (e.g., Guaaybess, 2013; Rugh, 2004), businesses (e.g., Sakr, 2007), the military (e.g., Khatib, Matar, & Alshaer, 2014), and representation (e.g., Gruber & Haugbolle, 2013). In particular, the debate centers on how Arab media, which were first and foremost an extended arm of political and military regimes producing propaganda and development discourses, have also come to engage myriad commercial, religious, Arab, and foreign interests. As such, Foucault (1988) draws our attention to the need to study power relations: "the strategies, networks, the mechanisms, all those techniques by which a decision is accepted and by which that decision could not but be taken in the way it was" (pp. 103–104). Arab media do not only produce and distribute value-free content but also commodities and ideologies, and therefore the debate on the power of Arab media matters only insofar as it engages with other forms of power.

In the remainder of the article, I am interested in how the production and circulation of entertainment television are associated with questions of power. So, when examining Arab entertainment media, I am concerned with the institutional structures and the media producers, how their products connect with culture, and how the growth of particular media institutions or products is connected to questions of power.

Arab Television Reclaiming Locality in a State of Flux

The Arab media industry is currently undergoing significant structural change, growing to become reintegrated in local contexts in contrast with the previous era of media regionalism, known as pan-Arab media. I have presented the historical development of Arab television elsewhere in much more detail than can be offered here (Khalil, 2015), but let us see why these changes are significant at least in outline.

The 1990s witnessed the emergence of a transnational, commercial, and mass media market, and the rise of a handful of media conglomerates. Through harnessing the power of political networking, economic clout, and cultural primacy, coupled with technological innovation and global production and distribution, these conglomerates transformed the Arab media landscape. The era of regional media was ushered in with the introduction of private satellite providers and receivers. Particularly, pan-Arab television reflected one of the critical elements of Harvey's (1989) theory of "demassification," a globalization of both production and consumption marked by "the annihilation of space though time" (p. 293). These changes generated a class of skilled, geographically mobile knowledge workers sensitized to working across time and space. In fact, these Arab television professionals crisscrossed between Rome, London, and the entirety of the Arab world to develop, produce, and broadcast programs with significant entertainment value (Khalil, 2013).

If the 1990s were the formative years of regional television, the 2000s witnessed the growth of regional entertainment programs. The convergence of economic and political powers allowed the relocation of "off-shore" Arab media to the region by lowering the threshold for censorship and providing economic incentives (Khalil, 2013). Scott (2004) noted that the landscape of global media production networks may be "making it possible for various audiovisual production centers around the world to establish durable competitive advantages and to attack new markets" (p. 474). The emergence of media clusters dedicated to television production has been interpreted as part of several modalities of governance allowing unprecedented growth in the Arab television industries (Khalil, 2015). Today, there are some 22,000 employees registered with these regional media clusters, including Dubai Media City, Studio City, and the Media Production Zone, indicating that the establishment of media clusters has created a pool of talent in Dubai, and that the production output and circulation reach of these media cities extend beyond the Arab world (Lakhpatwala, 2015).

In the past five years, Arab entertainment television has transformed the traditional role of media as merely responding to economic, political, and social forces. Now media have become a generative force at the service of a number of power spheres including the media industries themselves. In its own terms, entertainment television is caught in a web of ownership that includes but is not restricted to (patriarchal) moguls, nation-states, political groups, and regional and international conglomerates.

The past five years have seen an expansive regional media growth. Not only are the number of media outlets available via cable, satellite, mobile, and the Internet (IPTV and OTT) greater than ever before, but the companies themselves have also been expanding at an unprecedented pace (Northwestern University, 2016). In large part, this growth has been fueled by business decisions that increasingly acknowledge the need to address audiences in their locality. For instance, free-to-air satellite channels have increased from 487 in 2010 to 762 in 2015 (Atiyat, 2015). A closer look at these numbers reveals two characteristics. First, general channels, which provide a mix of entertainment and information, are the largest category (34.2% or 260 in total). Owned by either the state or the private sector, these channels overcome regulatory restrictions on broadcasting by using satellite technology to reach local or diaspora audiences. The remainder consists of niche channels providing various forms of news, promotion, education, or entertainment. Their audiences are further fragmented on the basis of subregional differences. For example, music multichannel Rotana is fragmented on the basis of Egyptian or Gulf tastes. This detailed inspection reveals that very few channels, if any, are engaged in reaching a pan-Arab audience as a homogeneous group.

Beyond the sheer scale of the expansion, one of the key differences in today's media companies is the wide variety of media platforms, genres, and territories they compose. Many of these companies are horizontally integrated, owning many different types of media products, such as satellite, print, and online, and offering news and various forms of entertainment. These companies are also involved in vertical integration efforts to own production and distribution facilities and offer local services. Technological change has often lowered the economic barriers and facilitated the involvement of media corporations in many different platforms.

Moreover, since 2010, the Arab world has been experiencing radical political and military power struggles. Politically, the series of mass social movements demanding regime changes, known as the Arab Spring, had ripple effects across the region. Coupled with demands for regime change, the region has also faced a number of military conflicts ranging from terrorist attacks (Lebanon, Tunisia, Iraq) to civil wars (Syria, Yemen, Libya) and the involvement of a number of local, regional, and international political forces. Instead of awakening transnational pan-Arab ideologies, these changes were characterized by an emergence of translocal sociopolitical adherence to the notion of state citizenship. From the Gulf countries to Morocco, there is a growing interest in local politics, broadly defined as a new social contract informed by demands for political and economic reforms. Unlike previous attempts to subscribe to a token of transnational nationalism devoid of citizenship rights, researchers have begun to observe a newfound precedence of national citizenship (Challand, 2013; Zubaida, 2011). Such change has directly impacted the news media, resulting in more locally based reporting, and it has also reinvigorated an interest in entertainment programs that reflect local circumstances.

A very rapid, albeit partial, illustration of these transformations is how a network such as MBC Group, born in London with Saudi financing, was capable of becoming the premier source of television entertainment not only for Saudis but also for Arabic-speaking audiences around the world. MBC's power to circulate its channels globally rests on its ability to recognize forms of cultural power (American and Bollywood films, Egyptian soaps and comedies, and Lebanese variety shows), leverage Saudi financing and advertising revenues, and, of course, secure government permits for the technological infrastructure needed for such circulation.

To maintain relevance to audiences, MBC Group localized its brand or sold broadcast rights to local channels. In 2012, MBC Masr was established with the purpose of maintaining MBC's competitive edge in the Egyptian market. Leveraging the company's economic and political powers, it developed a programming line-up that blended the channel's hits with local Egyptian programs. Branded as an "entertainment channel," it took MBC Masr only a few months to adjust to Egypt's changing political and regulatory climate before claiming to be the number-one channel in Egypt (Dubai Eye, 2014).

For the past three years, MBC Group offered rights to rebroadcast or simulcast its programs to Lebanese terrestrial channels. MBC managed to generate revenues from expensive reality or drama series, while maintaining its symbolic power as a provider of high-budget programs. According to a high-ranking executive, these "concessions" were deemed necessary to maintain the channel's leadership in local markets as local tastes and media access changed. Faced with eroding Saudi financial subsidies, the channel also had to ensure alternative revenue streams, as well as protect its leadership position.

These structural changes are pervasive, and are increasingly exhibiting divergences from the traditional explanations discussed earlier. Indeed, these structural changes are strongly interactional, linking global, regional, and local business strategies, media markets, and popular movements to economic, political, social, and symbolic power. As a result, the traditionally powerful regional media players are facing attractive local media and consequently raising significant questions and prompting key debates about the role and future of Arab media.

Conceptualizing the Business Push/Audience Pull

There are factors impacting media power as well as processes associated with media technologies, audiences' interests, and production practices. These are as true for Arab media as they are elsewhere. However, the focus on Arab entertainment television seems to reveal an evolving media landscape that systematically produces permutations of global media transformation. These permutations can be best described under the umbrella of a "business push"/"audience pull."

On one hand, the business push can be defined as the cumulative power of the various global, regional, and local cultural industries interested in aspects of homogenization and commodification of their entertainment products. As Golding (2004) suggests, it exemplifies "the triumph of private profit over collective need, corporate strategy over democratic direction" (p. vii). On the other hand, the audience pull sees local symbolic forces—such as tastes and interests, as well as communities—at its center. This pull involves the nation-state institutions rather than individual politicians and underserved audiences that include (but are not restricted to) children, youth, and specific indigenous communities. In fact, there is a reassertion of the "local" in film, television, video games, online, and other forms of media anchored in traditional forms of indigenous culture and its interpretation.

The remaining part of this article advances in two stages: First, I discuss aspects of the business push that is closely related to regional media entertainment conglomerates. I then discuss the manifestation of an audience pull that reveals its own interest in local narratives.

The success, influence, and power of media business interests and their practices can be debated, but cannot be denied. As Arab television industries move into an era of profit-making motives, the need to develop original content, adopt strategies, and meet revenue targets becomes a priority. Although this business push may seem, locally, a unique characteristic of pan-Arab channels trying to remain relevant in a changing media landscape, it is also a characteristic of local channels trying to develop financial independence from political funding. Three practices characterize the business push: content coproduction or codistribution, format television, and media investments.

The survival of pan-Arab entertainment television entails a restructuring of media financing and distribution. To ensure market dominance, regional players are resorting to rebroadcast or simulcast deals with local channels. Recent program analyses reveal that nonniche channels are opting for exclusive Arabic content. MBC 1, for example, prides itself in providing 100% Arabic content. Increasingly, in an attempt to bridge hegemonies of Arabic dialects, producers are developing content infused with multiple dialects to make it more acceptable on local channels. Such requirements are becoming unwritten rules for local channels to access codistribution or coproduction deals. In drama, Dubai is now home to sets for a number of dramas using Emirati, Lebanese, Syrian, Egyptian, and other nationalities as their cast. As a result of these reinvigorating practices, regional channels are still able to maintain production output and revenue streams, faced with a risk of losing their exclusivity over content in specific markets.

Live television programming has become a matter of survival for entertainment television, and consequently talent shows have an interest in maintaining a regional following. With contestants selected from various parts of the Arab world, these programs cater to their respective national followers. As Kraidy (2010) demonstrated, audiences consistently identify with and vote for particular contestants based on nationality rather than talent. These format programs, such as *Idol* or *Got Talent*, are considered localized versions of international programs (Rabadi, 2015). Few local channels are able to afford the production rights, and therefore, they have developed coproduction deals to offset these costs. Unlike the past decade, when the Lebanese Broadcasting Corporation International commanded a regional following with its *Star Academy*, it is now forced to coproduce and simulcast this program with an Egyptian local channel. Even a prominent regional channel such as MBC 4 has provided support for a local Lebanese channel, Murr Television, to produce and simulcast a version of *Celebrity Duets*. However, the business push is not independent of audience preferences, material conditions, or, for that matter, the creative expertise to produce high-quality entertainment programs.

Global conglomerates previously engaged in direct investment, strategic partnerships, or acquisitions of regional channels. Since 2003, channel franchising has become a trend, starting with the establishment of CNBC Arabia and continuing with a number of Fox channels, National Geographic, and Sky News channels. This trend signaled the region's business interest in acquiring "ready-to-broadcast" channels, with their standardized production practices, market segmentation, management protocols, and development of localized programs. Yet, in the past five years, a trend reversal is emerging, characterized by global conglomerates investing in regional startups. This involves a number of players including News Corp, Viacom, Bloomberg, Prima TV, and others (Haddad & Qweider, 2014). In 2012, Discovery Networks took ownership of the regional food channel startup Fatafeat for an estimated US$10 million—a sharp reminder of the 2009 Yahoo! takeover of the Arab webmail Maktoob (Flint, 2012). Such global engagements reveal a growing recognition of the Arab audience's pull, but perhaps just as important for long-term effects, regional channels also offer expertise to supplement more standardized channel franchising or product localization processes.

Whether in content development, format adaptation, or media investments, relations between global, regional, and local media businesses are increasingly affected by a growing concern about unsatisfied national audiences. This audience pull toward more locally focused offerings is manifesting itself via the rebirth of national broadcasters, as well as a YouTube phenomenon.

For the past five years, national broadcasters, characterized as regime mouthpieces as often as they are builders of national identity, have been relaunched with a dual mission of becoming relevant for local/national audiences and safeguarding local cultural values. From Morocco to Qatar, state-owned television and radio channels have undergone a process of "marketization" in the past decade, becoming more accountable to local audiences rather than just the governments that fund them. The development of channels such as Al Rayyan (in 2012) in Qatar should be understood as a process of reterritorialization whereby media technologies, practices, and processes are used to reinstate the local in a heavily globalized and regionalized media landscape. With a focus on the country's Bedouin traditions, Al Rayyan managed to attract a recognizable local audience alienated by an abundance of regional material. Similarly, in 2015, the television channel of the Emirate of Abu Dhabi adopted a strategy focused on the nation's history and identity. By developing channels and initiatives to support local talent and develop a sustainable local production, national governments are recognizing that a focus on local media and culture reestablishes their political grip on symbolic and social power.

The increase in Arab Internet users (now estimated at 100 million), the introduction of new technologies (broadband, smart phones, etc.), and adoption of social media have encouraged television channels to broaden their reach. For instance, MBC has established an online platform, Shahid.net, achieving 120 million media views and 12 million unique viewers during Ramadan 2014 (Dubai Eye, 2014). However, the television industry's online initiatives were motivated less by online eyeballs than by the threat of YouTube. The Middle East is YouTube's second largest market worldwide: Local users view around 5.3 billion hours on YouTube alone every year (equivalent to 14.5 million hours daily or 300 million daily views; Mostafa, 2014; Papavassilopoulos, 2014; Sajid, 2014). Although YouTube is a distinct phenomenon and concern of media conglomerates, it is certainly related to the funding, production, and distribution of audiovisual material online. Members of Gen Y (15–24 years old), who make up approximately 53% of the Arab population, are creating their own independent media outside the limitations of traditional production structures.

Whether they offer music videos, comedies, or dramas, these Web channels are providing entertainment content that is an alternative to traditional television, and in the process are forcing status-quo businesses to adopt and adapt their production techniques or personalities or even produce their shows.

For instance, Saudi Arabia's UTURN Entertainment Group, established in 2010, has developed a model for commercially supported online Web series produced by and for the Gen Y audience, peaking at 3.5 million viewers for its flagship show *Takki*, a youth drama Web series. *Takki* attracted a number of television channels before settling on London-based, youth-oriented Al Arabi Al Jadeed ["The New Arab"] to launch its second season in July 2015. Another Saudi-based Web production company, Creative Culture Catalyst, has launched a YouTube Channel, Telfaz 11, and has accumulated more than 80 million total views for its most popular show, *La Yekthar* ["Zip It"] (Digital in the Round, 2014; Jadaliyya, 2014). Undoubtedly, the Egyptian *al Bernameg* ["The Show"], inspired by Comedy Central's *The Daily Show*, remains the most popular transition from YouTube to television. What started as a series of YouTube satire videos, hosted by Egyptian surgeon Bassem Youssef, quickly became a prime-time television show that attracted 8.3 million faithful Egyptian viewers—and resulted in censorship, harassment, and threats from political and business power, as well. After only two seasons on two different broadcasters, the show ended, leaving its audience yearning for a replacement. Beyond providing the financial and political freedom for individuals to control content, YouTube enhances the ability of some audiences to produce socially and symbolically powerful media, raising questions that leave us guessing about the viability and durability of such alternatives over the longer term.

Conclusion

The real significance of the business push/audience pull processes lies in the recognition, by both local and regional media, of the viewers' agency. Since its introduction, pan-Arab television has operated according to the logic of standardization and homogenization. Its programs were developed to attract a specific, localized, desirable audience, particularly from countries with large disposable income, such as Saudi Arabia. As the cost of producing content for a marketable audience decreases (in terms of both technology and human resources) and the availability of amenable legal frameworks for media ownership increases, local television entertainment is coming to occupy more space in primetime schedules and often replaces regional or global shows. There is evidence of an incomplete but growing recognition of local viewers' agency: among other trends, television executives cite the "repatriation" of talent from regional channels to local channels; an increase in productions using local dialects; and the segmented blocks on regional channels for Egyptian, Syrian, or Gulf dramas; the increased awareness of subregional program exchange (Gulf, Levant, and North Africa). As a bellwether of the state of Arab television, advertising spending increasingly has been diverted from regional to local channels. In the words of an advertising executive, "You want to spend your money where the viewers are watching. American movies are great but nothing beats your local channel" (anonymous, personal communication, June 21, 2015). Not all regional channels are producing or programming entertainment for local audiences, but all regional channels have either recognized location as a niche-audience criterion, or have broken away from localization principles that assume Arab audiences are homogeneous.

In the analysis presented herein, there are still uncertainties concerning the evidence that forms the substance of my argument about the reconfiguration of media power. The observed practices within Arab entertainment television initially seem to support existing communication models related to geocultural proximity; yet, the rise of audience pull lies at the heart of the current permutations of media power, forcing regional media conglomerates to push toward further localizing their offerings. In other words, it is time we recognize the local as national and perhaps sub-national or hyper-local media, instead of using the term "local" to refer to regional media. Such a distinction will better serve to categorize an increasingly diverse and complex media environment. It took more than 20 years for a select few regional channels to find an audience and advertising clients, and start turning profits. Could we be witnessing a reversal of fortunes?

First, there is a growing sense of "reterritorialization" characterized by the reestablished connection between identity (as Arab, Muslim, Qatari, Emirati, rural/Bedouin, urban, etc.) and locality (the place of exposure to or contact with media). Consequently, as audience agency is exercised further, the need for pan-Arab entertainment becomes less pressing. Additionally, local media efforts and successes are not separate from these locally embedded identities. Second, pan-Arab entertainment television programs only appear natural because of their ubiquitous and pervasive presence in the daily lives of Arabs for the past 25 years. The spectrum of media products and institutions currently evolving in the Arab world is no longer restricted to legacy media outlets. Any current analysis has to incorporate the range of alternatives that include (but are not restricted to) pirated media, shared media, and do-it-yourself media. The third observation, derived from interviews with practitioners in both professional and alternative media, is the growing rejection of academic reductionism, in particular reducing media power to regulatory privileges, political support, economic revenues, audience measurement, online media presence, or other single explanations.

A better understanding of these three observations—rejected, dismissed or ignored for so long—might help us chart our way in future Middle East and North Africa media studies no longer blinded by restrictive analyses based on geography, language, or even technologies.

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