Al Jazeera:
A Middle Eastern Enfant Terrible Goes Global

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This case was written by Danielle Geara and Johanne Staugaard Johansen, both INSEAD MBA participants 2009, under the supervision of Annet Aris, Adjunct Professor of Strategy at INSEAD. It is intended to be used as a basis for class discussion rather than to illustrate either effective or ineffective handling of an administrative situation.

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“Al Jazeera is a fresh perspective – we tell it like it is,” said the voice-over in Al Jazeera’s promotional video. The media network’s video also included clips from war zones, people in despair, and a well-groomed George Clooney endorsing Al Jazeera. The European broadcasting centre of Al Jazeera was based close to Hyde Park Corner in London, where red double-decker buses frequently passed by and some of London’s most fashionable shopping areas could be found. From this centre daily meetings were held with the company’s headquarters in Qatar to discuss which news to broadcast and which directions to take in terms of strategy and distribution.

Al Jazeera had attracted international attention for its frank style, its coverage of global issues with a focus on the people affected, and its attempt to become “the voice of the voiceless”. Some praised Al Jazeera for adopting a different perspective and for its revolutionary achievement in becoming the first editorially independent news channel in the Middle East; others criticised it for being too controversial and sensational, and referred to it as “terrorist TV” because it had given air time to terrorist groups. (Exhibit F provides a selection of answers from a survey conducted in June 2009 regarding perceptions of Al Jazeera).

Al Jazeera now faced the essential question: how sustainable was its success? In order to answer this question, Al Jazeera needed to address at least three key issues. Firstly, it had to determine how it could transform from a Pan-Arabic news channel into an international media network, and at the same time remain a strong player in an increasingly competitive media landscape in the Middle East. Secondly, it needed to identify how it could both leverage and demystify the original Al Jazeera brand when catering to global media consumers. And thirdly, Al Jazeera needed to establish how it would deal with its financial dependence on the Emir of Qatar going forward.

Al Jazeera’s History

Establishing an Independent Pan-Arabic News Channel

The story of Al Jazeera began in Qatar in the mid 1990s. Thanks to Qatar’s high-quality oil resources, prosperity and social progress had risen since the 1950s. In 1995, Sheikh Hamad bin Khalifa Al Thani had just come to power as the Emir and was eager to put Qatar on the map.

Parallel to the changing political climate in Qatar, the BBC had been working in Saudi Arabia to launch a Pan-Arabic news channel. However, when the Saudi government would not allow the BBC full editorial freedom, it made the decision to pull out. The BBC’s failure to establish an independent news channel in Saudi Arabia prompted the Emir of Qatar to fill the gap in the market in a different way. It also meant that a number of journalists, producers and other people with experience in broadcasting were now available in the region.

The Emir of Qatar recognised the opportunity to create an independent and objective news channel that would stand in contrast to other channels in the region that were at the time, influenced by government to varying extents. As a result, the satellite channel Al Jazeera (“The Island”) was launched in Doha, Qatar in 1996. An initial US $150 million grant from the Emir of Qatar made the launch possible. Wadah Khanfar, Director General at Al Jazeera, pointed out:
The vision mainly was to introduce to the Arab world free reporting that is distant from propaganda, and at the same time to give the Arab world the opportunity to express opinions. This is why our motive is to give all the opinions.

In 2006 Al Jazeera launched an English-language news channel. By 2009, Al Jazeera had established a global team of 5,000 employees in over 50 countries comprising 30 nationalities and 350 journalists, with headquarters based in Doha. The global team was connected via broadcasting centres based in London, Washington D.C. and Kuala Lumpur, in addition to approximately 70 bureaus located around the world. (Exhibit A provides an overview of Al Jazeera’s worldwide locations).

Expansion of Product Offerings

From its launch in 1996 until early 2000s Al Jazeera essentially remained an Arabic news and current affairs satellite TV channel. Since then Al Jazeera expanded into a network with specialty TV channels in multiple languages and in several regions of the world. By 2009 its offering had become a mix of talk shows, news programming, news analysis and documentaries. In addition to the original flagship channel, Al Jazeera Arabic, the network comprised a range of speciality channels including:

- Al Jazeera Sports (2003) - Arabic-language sports channel,
- Al Jazeera Mobasher (2005) - live politics and public interest channel that broadcasts in real time without editing or commentary,
- Al Jazeera Children’s Channel (2005) - children’s channel for kids under 13,
- Al Jazeera English (2006) - 24h English-language news channel,
- Al Jazeera Documentary Channel (2007) - Arabic-language documentary channel, and
- Baraem (2009) - most recently launched channel for pre-school kids (3-6 years old).

(Exhibit B provides an overview of the timeline of new channels launched by Al Jazeera).

The launch of Al Jazeera Sports had been particularly successful and the channel had quickly grown to become the most popular sports channel in the Middle East. It covered a wide range of major sporting events, such as the UEFA European Football Championship and the Olympics. Al Jazeera Sports also held exclusive broadcasting rights in the Middle East for major football leagues, including the Spanish La Liga and the Italian Serie A.

The most important new initiative following the launch of Al Jazeera had been the introduction of an English-language channel that targeted a global audience aimed at transforming Al Jazeera into an international media network. The idea was not to merely replicate the content in the original Arabic channel and broadcast it to an English-speaking audience, but to create a truly international channel, managed by a Western team and staffed with English speakers. “We do not aim for one demographic. We are aimed at anyone who wants a different take on world news and a questioning attitude to power,” indicated Ben Rayner, executive producer at Al Jazeera English in London.

Al Jazeera English was launched in 2006. It was the first time an Arab media channel had broadcast news in English 24 hours a day. The initial plan was to provide an alternative to
BBC and CNN, and to leverage on the increasingly powerful brand of Al Jazeera. Two and a half years after its launch, Al Jazeera English had grown to be much bigger than the Arab version and covered almost 140 million households compared to Al Jazeera Arabic’s audience of 50 million households. Al Jazeera English was available worldwide in more than 100 countries. (Exhibit C provides list of editorial highlights of Al Jazeera English).

Market Developments

Although the Middle East was not homogenous, the countries of the region had some shared characteristics. The Middle East had a younger population on average than any other part of the world. Over 50% of the population in Yemen, Oman, Saudi Arabia, Jordan, Morocco and Egypt was estimated to be less than 25 years old, while in the remaining countries the under-25s made up 35% to 47% of the total population. Furthermore, in most countries the population was rapidly growing.¹ The Middle East was also experiencing growing GDPs across the region and economic growth had gradually created a larger middle class.

In terms of media, significant differences existed between Middle Eastern countries. Broadband penetration varied significantly across the region but was still very low in many countries (often less than 10%). In contrast, mobile technology and mobile phones were rapidly emerging as rival means of broadband access to internet content, and mobiles were also developing as an alternative way to watch television. However, generally TV was considered a very important source of information and news in the Middle East, reinforced by the fact that illiteracy was still widespread, rendering print media a less effective form of communication.

Although satellite television channels had originally been perceived as an entertainment alternative, they were increasingly seen as a more credible source of information than local media. According to Synovate’s European Media and Marketing Study (EMS) in 2008 (June to September), the results of which were published on ArabianBusiness.com, top earning Arabs and regional decision makers preferred CNN for their English language news. Surveying the main income earners in the top 13% of Middle East households, CNN ranked number one in the Middle East for monthly reach, with 21% of the audience. BBC World News ranked second (15.6%), followed by Al Jazeera English (9%), CNBC (4.8%) and Euronews (3.6%)².

Legal restrictions on the press varied between countries, as did the level of state influence on the media. For example, Lebanon, Israel and Turkey afforded the press a relatively large degree of freedom and independence vis-à-vis most other countries in the region. The launch of Al Jazeera marked a breakthrough in Middle Eastern media environment because it was the first Middle Eastern news channel that was exempt from governmental control and was editorially independent. For example, it openly criticised monarchies in the region, and in this sense crossed many of the boundaries that had previously been commonly accepted. At various times in the past it had been banned from broadcasting in various countries including Iraq, Algeria, Morocco, Egypt and Saudi Arabia. At one time, Al Jazeera Arabic had been banned in every single country in the Middle East – except Israel.

¹ Arab Media Outlook, 2008-2012 (PricewaterhouseCoopers, 2009)
Although periodically banned from broadcasting, it was popularly regarded as a reliable source of information. The Knowledge World Center for Polls reported that 96% of Arab academics found Al Jazeera to be a reliable source for news. (Exhibit D provides an overview of the viewer demographics of Al Jazeera Arabic. Exhibit E provides an estimate of the total potential audience of Al Jazeera in the Middle East).

**Increased Competition**

By 2009, Al Jazeera was no longer the only media network in the region that claimed to be independent and objective. Competitors were now both Arabic broadcasters such as Al Arabiya and Al Hurra, as well as the Arabic units of international broadcasters such as BBC Arabic, launched in 2008.

Al Arabiya, for instance, launched in 2003 and partly owned by the Saudi-owned and Dubai-based broadcaster Middle East Broadcasting Center (MBC), was perceived to be both credible and also more moderate than Al Jazeera, and had gained market share. The television network Al Hurra was created by the US government to compete directly with Al Jazeera Arabic. Launched by the Bush administration in an attempt to counter Al Jazeera’s coverage of the invasion of Iraq, it had not yet succeeded in winning a big audience share.

For Al Jazeera English, in addition to BBC and CNN, competition now included CCTV-9, Channel News Asia, Deutsche Welle, EuroNews, France 24, Nile TV, Press TV and Russia Today. In a further sign of the increased level of competition in the Middle East, CNN was in the process of establishing a GCC hub (Gulf Cooperation Council) with a base in Abu Dhabi, featuring daily live television broadcasts as well as handling regional advertising sales.

In addition to competition from rival television broadcasters, another important issue faced by Al Jazeera going forward was that its main competitors were no longer limited to television broadcasters but also included other media such as websites (e.g., CNN’s website). Not only did Al Jazeera seem to be losing its first-mover advantage, in the future it needed to address competition from less traditional forms of media.

**Al Jazeera’s Current Challenges**

**The Original Al Jazeera Brand: A beloved Enfant terrible**

Al Jazeera had succeeded in building a powerful brand. It was ranked among the five most powerful brands both globally and in Europe and Africa in 2004, according to Brandchannel, together with the prominent brands of Apple, Google, Ikea and Starbucks. Forbes Arabia ranked Al Jazeera as the No. 1 Arab brand in a report on ‘The Top 40 Arab Brands in 2006.’

Several factors had been essential in the development of the strong Al Jazeera brand:

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3 Gulf Cooperation Council members: United Arab Emirates, Bahrain, Saudi Arabia, Oman, Qatar, Kuwait
The Voice of the Voiceless

Al Jazeera’s presence in the neglected areas of the world and its use of local resources and local knowledge had contributed to the development of the company’s brand. It attempted to be “the voice of the voiceless”. Content was often exclusive and Al Jazeera sought to differentiate itself from other news channels by presenting evidence from “the ground” instead of reporting from a distance. Local correspondents reported news from all over the world, trying to give the impression of “native” coverage. “We want Africans to tell us about Africa and Asians to tell us about Asia,” explained Nigel Parsons, former Managing Director of Al Jazeera English, in 2007.

Dealing with Taboos

An aura of truth had developed around Al Jazeera and it was seen as a channel that would “tell it like it is”, due to the fact that it had been the first editorially independent channel in the region. Al Jazeera had confronted taboos such as homosexuality, women’s issues and the wearing of the hijab. Moreover, Al Jazeera had invited Israeli officials to participate in talk shows, marking the first time Israeli politicians, intellectuals and journalists had appeared on an Arab news channel to speak about issues related to the Palestinian/Israeli conflict.

Covering the Wars in Iraq and Afghanistan

Some commentators claimed that Al Jazeera had established itself through reporting on the wars in Afghanistan and Iraq, and in this way had established a brand for itself. Al Jazeera’s broadcast of the Osama bin Laden tapes following the events of September 11th 2001 had attracted significant international attention and had been an important part of the brand-building process. For example, the tapes had shown Osama bin Laden in an Afghan mountain hideout, and a bin Laden spokesman had delivered the message that, “The storm of airplanes will not be calmed.” Moreover, bin Laden’s messages had been transmitted without editing. Al Jazeera had also shown images of destruction and innocent victims as a result of US bombings.

In 2004, at the height of the Iraq war, then-Defense Secretary Donald Rumsfeld had accused Al-Jazeera (Arabic) of “vicious, inaccurate and inexcusable” reporting. Although some observers found its rhetoric anti-American, others applauded Al Jazeera for showing the conflict from another perspective. The question was whether Al Jazeera had gone too far and whether it had taken the right level of responsibility in broadcasting graphic war scenes.

De-mystifying the Brand

Mark Jurkowitz, Associate Director of the Pew Research Center's Project for Excellence in Journalism, pointed out that when Al Jazeera English was launched in 2006, “There was a stigma attached to Al-Jazeera English, deserved or not, because of its relation to the Arabic version.” So while the original Arabic brand remained essential for Al Jazeera’s overall strength, Al Jazeera actively moved to de-mystify and soften its brand in order to become a global media player.

Al Jazeera English was different from the Arab version in several key ways. For example, the use of terminology varied between the two, with words such as “martyred” in the Arabic
version replaced by “killed” in the English format. Al Jazeera English did not broadcast Islamic greetings or programmes, and showed fewer Arab faces on screen. Top talents from other networks were hired, including star journalists and reporters such as veteran BBC broadcaster David Frost, former BBC and CNN anchor Riz Khan, former CNN and BBC news anchorwoman and award-winning journalist Veronica Pedrosa. While the resulting rich palette of superstars from the news industry increased its credibility and popularity amongst viewers, there were concerns that this strategy could make it look like a collection of individuals and would fail to establish a distinct identity or a coherent discourse for the Al Jazeera brand.

Whilst some commentators had suggested standardising the two channels in order to strengthen Al Jazeera’s competitive position, many felt this strategy was too risky. Al Jazeera therefore found itself needing to maintain a balance between being a revolutionary, controversial Arab brand on the one hand, and being an aspiring international player competing in the same league as CNN and BBC on the other.

**Distribution Strategy**

Al Jazeera could be accessed through satellite, cable, IP TV over ADSL, phone with Al Jazeera Mobile and the internet. It adopted an interactive approach towards consumers, inviting viewers to contribute on its website and TV talk-shows, as well as asking them to submit ideas for the company’s logo through a logo design competition.

In one initiative aimed at extending its global reach, in January 2009, Al Jazeera released some of its broadcast quality footage from Gaza under a Creative Commons license. Contrary to the usual “All Rights Reserved” standard, the license invited third parties, including rival broadcasters, to reuse and remix the footage as long as Al Jazeera was credited.

**Stepping into the US Market**

Despite Al Jazeera’s global successes, major cable providers in North America were reluctant to pick up Al Jazeera English. This was in part due to the reputation and controversy of its Arabic-language counterpart. Also, according to the Pew Research Center’s Annual Report on News Media at the time, US cable networks spent only 8% of their time on foreign coverage in 2008.

Al Jazeera English multiplied its efforts among cable operators and consumers by launching a vast campaign through Facebook, blogs and dedicated websites such as http://iwantaljazeera.net. It understood that a possible first step into the attractive US market was to enter via the Canadian cable networks. Another possible route was via the internet. Al Jazeera English claimed that at least half of its web traffic, or 11 million visitors a month, came from North America-based IP addresses. Still, US television remained the primary source from which most Americans accessed their video news.

**New Media**

Al Jazeera actively pursued new media in its distribution strategy, not just in North America, but also in the Middle East and the emerging markets in general. For Al Jazeera, new media represented a bridge to both young people and to unreached geographies. Whilst internet penetration was low in the Middle East, Al Jazeera believed it represented a huge potential for
the future, and its strategy of being innovative in terms of online presence and mobile applications was seen as a way to better target younger consumers who were generally considered more “new media friendly”.

In addition to services like podcasts, a YouTube channel, a Facebook account, an iPhone application and multiple Twitter news feeds, Al Jazeera had launched a Twitter account and an interactive map of citizen-submitted reports to follow developments in Gaza. (Appendices G and H show Al Jazeera’s distribution channels and new media initiatives).

**Strategic Partnerships**

Al Jazeera also pursued strategic partnerships to develop its reach. For example, in 2008 it announced a new deal with one of Asia’s leading cable operators, Hong Kong Cable Limited, enabling it to broadcast in Hong Kong. In January 2009, Al Jazeera announced a partnership with Sony Ericsson, whereby RSS feeds of its news content would be pre-installed on four models of its mobile devices in both the Middle East and North Africa. Also in January 2009, Al Jazeera and *The Independent* announced a new partnership that brought Al Jazeera English video news bulletins to the web pages of the www.independent.co.uk, one of the leading British newspapers. Furthermore, in May 2009 Link TV – the largest independent television broadcaster in the US, devoted to providing diverse global perspectives on news and world culture not typically available on other US networks – announced that it would present a new global news hour including “World News” from Al Jazeera English.

These strategic alliances were consistent with Al Jazeera’s objective of international expansion but they raised questions such as how these partnerships would affect the Al Jazeera brand and whether the partners were the right fit for Al Jazeera in terms of brand image and consumers.

**Financial and Editorial Independence**

Launched on the initiative of the Emir of Qatar, Al Jazeera continued to rely heavily on grants from the Emir as its main source of income, although it had originally aimed to become financially independent in 2001.

Advertising was limited on both its Arabic and English channels. Al Jazeera Arabic mainly attracted Qatari advertisers and had trouble attracting other advertisers. Al Jazeera English had chosen an approach of limited advertising and prided itself on favouring content over revenues. Whilst often cited as a weakness, the Emir’s funding had clearly provided Al Jazeera with a large degree of independence from advertisers in terms of editorial content, as advertisers could potentially seek to influence the choice of programmes, content and style.

In addition to the grants and some limited advertising income, Al Jazeera also generated revenue through subscription-based sports channels, broadcasting deals with other companies and the sale of footage. Moreover, Al Jazeera had entered into a deal with Google to share advertising revenues from the Al Jazeera YouTube channel.

Nevertheless, financial support from the Emir remained the Achilles’ heel of Al Jazeera, because it rendered it highly dependent on Qatar’s financial health and political stability, as well as the goodwill of the Emir. Changes in the political or socio-economical situation in Qatar could oblige Al Jazeera to seek alternative sources of revenue to fund its operations.
Setting Strategies for the Future

Al Jazeera had, within only a few years, grown from a revolutionary Middle Eastern *enfant terrible* into an international media network. But the question now facing senior executives at Al Jazeera was: how sustainable was Al Jazeera’s success?

Internationally, Al Jazeera’s main differentiation strategy had been its reporting from neglected areas and being “the voice of the voiceless”. However, if other big players in the news arena were to apply a similar focus, Al Jazeera might have difficulty keeping its competitive niche.

Another potential weakness stemmed from Al Jazeera’s distinct style, considered by some to be wordy and depressing, and to focus too heavily on topics of death and destruction. This was linked to the fact that Al Jazeera insisted on showing “the ugly face of war” and avoided sanitizing the news. Al Jazeera was increasingly aware that viewers around the world wanted more positive stories, especially younger consumers.

A more general threat was seen to be the fact that some analysts questioned the future of the rolling news format of 24-hour TV satellite and cable channels, as many people were now turning to the internet for news. Whilst Al Jazeera had actively adopted new media initiatives, including making extensive use of the internet, questions remained as to how it could effectively monetize digital news broadcasts.

Going forward, Al Jazeera was also considering opportunities for new product development to gain a foothold in new markets. It had announced the planned launch of Al Jazeera in a number of other languages, including Al Jazeera Urdu, catering mainly to Pakistanis. It was felt that this would give Al Jazeera an opportunity to become “the CNN of the emergent markets”.

Al Jazeera was also reported to have investigated the possibility of launching a newspaper and printing business. Whilst this move could be seen as surprising as the world witnessed the newspaper industry struggle, it seemed more relevant in the Middle East than elsewhere as printed news generally had more credibility than digitized news in the region.

Al Jazeera’s senior executives needed to decide how to move forward and set strategies for the brand, the target markets and to address financial issues, including the heavy dependence on the Emir of Qatar. Firstly, they needed to decide whether they wanted to clearly separate the Arab and international Al Jazeera brands, or whether the original Arab link should be leveraged even more. Secondly, Al Jazeera needed to define a clear way ahead in terms of which markets and consumers to address and strategies to achieve this, especially with regard to the products it wanted to offer. Thirdly, it needed to deal with the question of vulnerability arising from its financial dependence on the Emir of Qatar.

How could the leadership within Al Jazeera ensure that going forward the controversial *enfant terrible* of the Arab world would become an internationally acclaimed and independent media network in the same league as giants such as CNN and the BBC?
Headquarters: Doha

Broadcast centres: Washington DC, London, Kuala Lumpur

Bureaus:
Abidjan
Almaty
Amman
Ankara
Athens
Baghdad
Bahrain
Beijing
Beirut
Berlin
Brussels
Buenos Aires
Cairo
Caracas
Dakar
Damascus
Dubai

Delhi
Gaza
Harare
Islamabad
Jakarta
Jerusalem
Johannesburg
Kabul
Khartoum
Madrid
Manila
Masqat
Mogadishu
Moscow
Nairobi
New York

Ndjamena
Nouakchott
Oslo
Paris
Rabat
Ramallah
Sana’a
Sarajevo
Sao Paolo
Sydney
Tehran
Tokyo
Tripoli
Tunis

Source: “Al Jazeera – Setting the News Agenda”, an Al Jazeera leaflet
1996: Launch of Al Jazeera, the original Arabic-language 24h news channel. Link: www.aljazeera.net/channel

2003: Launch of Al Jazeera Sports, an Arabic-language sports channel. Link: www.aljazeerasport.net

2005: Launch of Al Jazeera Mobasher, a live politics and public interest channel, which broadcasts conferences in real time without editing or commentary.

2005: Launch of Al Jazeera Children’s Channel, a children’s interest channel (up to 13 years old). Link: www.jcctv.net

2006: Launch of Al Jazeera English, a global English-language 24h news channel.

2007: Launch of Al Jazeera Documentary Channel, an Arabic-language documentary channel. Link: www.doc.aljazeera.net

2009: Launch of Baraem, a channel for pre-school children (3-6 years old). Link: www.baraem.tv
Al Jazeera English Editorial Highlights

Below is a list of editorial highlights for Al Jazeera English compiled by Al Jazeera:

**The War on Gaza**
As the only international English language news network that broadcast from inside both Gaza and Israel, Al Jazeera provided live and comprehensive coverage of the war. With its unique access, Al Jazeera became the consistent and credible news source, both for viewers and other media. Al Jazeera had permanent bureaus in both Palestine and Israel.

**Afghanistan**
Al Jazeera had a fully staffed bureau in Afghanistan and provided comprehensive coverage from the start of the conflict and throughout the evolving situation. Al Jazeera teams covered the actions of both the NATO’s International Security Assistance Force and the Taliban.

**Russia/Georgia War**
With journalists on the ground in Tbilisi, North and South Ossetia, and Moscow, Al Jazeera covered all sides of the complicated and fast-moving story of the Russia/Georgia war.

**Myanmar Insurrection**
Al Jazeera reported exclusively from inside Myanmar during the monks’ uprising and the ensuing crackdown.

**Myanmar Cyclone**
Al Jazeera was one of the first networks on the ground inside Myanmar after the cyclone hit. Two Al Jazeera teams also reported from Bangkok as aid efforts built up.

**The Assassination of Benazir Bhutto**
Al Jazeera reported live within minutes of the assassination of Bhutto. Al Jazeera teams provided comprehensive coverage of the ensuing political dynamics after Bhutto’s death as the country decided on a new leader.

**Zimbabwe Elections**
Al Jazeera reported from inside Zimbabwe as the people of the country voted for their president. The comprehensive reporting by Al Jazeera teams on the ground covered the political issues surrounding the election, including voter intimidation, the ensuing standoff and diplomatic attempts to resolve it.

**Kenya Elections**
Al Jazeera reporters covered the story of the elections live as the political deadlock began and the ensuing violence.

**The US Presidential Elections**
Al Jazeera offered comprehensive coverage of the US presidential candidates and the opinions of American voters. In addition to Stateside reporting, Al Jazeera explored in depth how the election would influence the rest of the world, and canvassed the opinions of people from around the globe.

Source: Al Jazeera Media Pack 2009, Al Jazeera English (Al Jazeera Network – Communications and Corporate Relations – 2009)
Exhibit D
Al Jazeera Arabic Viewer Demographic

Source: http://www.allied-media.com/aljazeera/JAZdemog.html
<table>
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<th>Country / Region</th>
<th>Total Population</th>
<th>Arabs (%)</th>
<th>Total Adult Arabs (15y+)</th>
<th>Penetration (%)</th>
<th>Potential Audience</th>
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<td>21,833,492</td>
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<td>4,642,578</td>
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<td>47.0</td>
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<td>Turkey</td>
<td>68,109,469</td>
<td>10.0</td>
<td>4,958,369</td>
<td>10.0</td>
<td>495,837</td>
</tr>
<tr>
<td>United Arab Emirates</td>
<td>2,484,818</td>
<td>40.0</td>
<td>728,549</td>
<td>52</td>
<td>378,845</td>
</tr>
<tr>
<td>United States</td>
<td>n/a</td>
<td>n/a</td>
<td>n/a</td>
<td>n/a</td>
<td>1,000,000</td>
</tr>
<tr>
<td>West Bank &amp; Gaza Strip</td>
<td>3,512,062</td>
<td>88.6</td>
<td>1,680,311</td>
<td>99.0</td>
<td>1,663,508</td>
</tr>
<tr>
<td>Yemen</td>
<td>19,349,881</td>
<td>98.0</td>
<td>10,088,254</td>
<td>27.0</td>
<td>2,723,829</td>
</tr>
<tr>
<td><strong>GRAND TOTAL</strong></td>
<td><strong>405,498,865</strong></td>
<td></td>
<td><strong>161,102,989</strong></td>
<td></td>
<td><strong>53,208,177</strong></td>
</tr>
</tbody>
</table>

Source: http://www.allied-media.com/aljazeera/JAZdemog.html
Exhibit F
Survey, June 2009 – Selection of Answers from 93 Respondents

What comes to mind when you think about Al Jazeera?

• “Arabic CNN” – Canadian
• “Best and most complete Arab news channel in the world. For any news about the Middle East, watch it for 15 minutes and you will know everything.” – Lebanese
• “War reports, international recognition. Wide popularity” – German
• “Broadcasting images of Saddam Hussein with Western hostages during the first Gulf War.” – Brazilian
• “Neutral, non-biased information” – German
• “The only times I hear about Al Jazeera is when a terrorist group uses it as a broadcast mechanism.” – American
• “Governmental TV, biased, against the west, pro-Iranian, pro-Palestinian, good connection with terrorists and extreme Muslim.” – French

What makes Al Jazeera different from other 24-hour news channels?

• “Arab perspective” – Canadian
• “Messages from Bin Laden are communicated through Al Jazeera.” – Dutch
• “Independence from the Western view” – South Korean
• “Reality with no political distortion.” – NA
• “Often controversial news coverage as the only ones that can access certain people and organisations.” – Colombian
• “The counterpoint to the western television.” – Brazilian
• “Access to zones where BBC/CNN don’t go. Talks a lot about Africa (forgotten conflicts).” – French

What do you think are the weaknesses of Al Jazeera?

• “Public opinion outside sees it as biased towards the Arab world. Sadly, it is regarded by some North-Americans as tied to terrorism/ a voice for terrorists.” – Canadian
• “Negative image due to heavy overload on war coverage.” – German
• “Leaned towards sensational reporting in recent years due to the high competition with Al-Arabiya and other good quality media channels.” – Moroccan
• “One sided, partisan reporting.” – British
Exhibit G
Al Jazeera's Distribution Channels

- Al Jazeera English is widely available on cable and satellite platforms throughout the world.
- Al Jazeera Arabic reaches approximately 50 million viewers.
- Al Jazeera English broadcasts to nearly 140 million households in more than 100 countries. A complete list of countries currently broadcasting AJE is available at: http://english.aljazeera.net/watchaje
- Al Jazeera English can be watched streaming live online at www.livestation.com/aje
- Al Jazeera is the most watched news channel on YouTube, receiving 2.5 million views per month.
- The Al Jazeera English website receives 22 million visits every month. Approximately half of the Al Jazeera English website traffic comes from the United States and Canada.
- A snapshot of Al Jazeera English’s website, 21st June 2009:

Sources: Al Jazeera Media Pack 2009, Al Jazeera English (Al Jazeera Network – Communications and Corporate Relations – 2009) and Al Jazeera English’s website http://english.aljazeera.net/
Exhibit H
Al Jazeera’s New Media Initiatives

Facebook
The Al Jazeera Facebook Application allows you to keep up-to-date with all the news from Al Jazeera. You can also interact with programmes such as the Riz Khan show on Facebook.

IM Bot
The Al Jazeera IM Bot allows you to receive breaking news directly to your email or Instant Messaging client. Just add aj.breaking@gmail.com to your IM Profile.

Mobile Web Service
Get the latest News and Sport from Al Jazeera on your mobile. This service is now available in both Arabic and English. Simply go to http://im.aljazeera.net on your mobile.

iPhone Application
Read the latest news from Al Jazeera anytime, anywhere in an easy to read format for your iPhone or iPod Touch. Just tap in i.aljazeera.net into your browser and start reading.

Twitter
Let the news follow you wherever you are. Simply follow your desired news channel in order to receive the latest headlines via Twitter.

Sony Ericsson RSS
Al Jazeera and Sony Ericsson have partnered to bring the world’s top stories straight to mobile phones through RSS feeds in both Arabic and English.

Podcasts
Subscribe to Al Jazeera podcasts to have your favourite Al Jazeera programmes delivered directly to you. Available through iTunes in Arabic and English.

YouTube
Al Jazeera on YouTube is the easiest way to watch Al Jazeera on the web. Go behind the glossy headlines with our diverse news reports and in-depth programming.

Special Projects
The team also produce special projects that use the latest technology. Previous projects include a Geo-Tracking journey through the Sahara using a GPS enabled mobile phone.

Sources: Al Jazeera Media Pack 2009, Al Jazeera English (Al Jazeera Network - Communications and Corporate Relations – 2009) and Al Jazeera Labs (http://labs.aljazeera.net)
References

Links to articles about Al Jazeera:

- “Al-Jazeera: a top brand from Arabia?”, http://www.360east.com/?p=113
- Al Jazeera vs. Al Arabiya: are we getting sick of the former?, http://www.360east.com/?p=284
- “Al Jazeera: Turning up the heat”, http://knowledge.insead.edu/aljazeera080105.cfm
- “The international news will not be televised”, June 2009, http://experts.foreignpolicy.com/posts/2009/06/04/the_international_news_will_not_be_television
Information about media in the Middle East

- Overview of newspapers in all countries: http://www.world-newspapers.com/
- Overview of online newspapers in all countries: http://www.onlinenewspapers.com/
- Middle East & North Africa Media Guide (MediaSource, 2009)
- BBC News’ Country Profiles (including descriptions of media situations): http://news.bbc.co.uk/2/hi/country_profiles/default.stm
- “Arab Media Outlook, 2008-2012”, PricewaterhouseCoopers, 2009
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