

MIDDLE EAST PUBLISHERS' ASSOCIATION

MEPA'S OBJECTIVES:

- To encourage the widest possible spread of publications throughout Middle East and beyond.
- To promote and protect by all lawful means the publishing industry in Middle East
- To protect members by dealing collectively with problems.
- To cooperate for mutual benefits with other organizations concerned in the creation, production and distribution of publications.
- To promote the development of public interest in publications in association with other publishing organizations with similar objectives.
- To serve as a medium for exchange of ideas with respect to publication, sales copyright and other matters of interest.

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NEW MEMBER'S PROFILE

WE WELCOME TWOFOUR54 AS A NEW MEPA MEMEBR IN 2009

about twofour54

Overview

Named after the geographical co-ordinates of Abu Dhabi, twofour54's vision is to enable the development of world class Arabic media and entertainment content, by Arabs for Arabs, and to position Abu Dhabi as a regional centre of excellence in content creation across all media platforms including film, broadcast, music, digital media, events, gaming and publishing.

Our aim is to create a collaborative and supportive campus community; stimulating creative and professional partnerships through our three key business pillars: tadreeb -the training academy; ibtikar - innovation & support; and intaj - state of the art production facilities. Our three pillars are supported by a business enabler tawasol, which provides support to organisations and individuals looking to join the twofour54 community.

Twofour54 offers media and entertainment organisations a complete range of services that help drive their business success and growth in the region:

- ♦ Registration and licensing for media businesses at twofour54.
- ♦ Company and personal set-up services for your business and staff.
- ♦ Customised office space solutions for your business needs.
- ♦ World-class studio production and post-production facilities supported by technical staff. All available for hire for your production needs in the region.
- ♦ Broadcast services - Playout Centre, Uplink and Downlink teleport services and digital asset management centre.
- ♦ Vocational media training. Our Academy offers over 200 industry courses as well as tailored training solutions for your organisation.
- ♦ Industry investment and business support for Arab entrepreneurs and fledgling media and entertainment content businesses from the region.

Twofour54 consists of three key pillars: twofour54 tadreeb (the training academy), twofour54 ibtikar (innovation and support) and twofour54 intaj (state-of-the-art production facilities) all supported by business enabler twofour54 tawasol (one-stop-shop).

Towfour54 Tadreeb:

Twofour54 tadreeb works with high profile partners to create MENA's leading media training academy.



twofour54 tadreeb offers world-class courses in all aspects of media content development for both media and entertainment professionals, including broadcast technology, television production, media business, journalism and radio. The state-of-the-art training academy is located in Abu Dhabi, offering courses in both English and Arabic, allowing easy access to media professionals from the MENA region.

Twofour54 Ibtikar:

twofour54 ibtikar provides media and entertainment industry funding and support for start-up and early stage businesses and individuals with creative ideas and a passion for success.



twofour54 ibtikar offers two sources of funding:

- ibtikar ventures for entrepreneurs and businesses that need start-up, early stage or growth capital and business development and operational support;
- ibtikar creative lab grants for talent that would benefit from seed funding, development guidance and planning to get a great idea off the ground.

Our core focus is on backing Arabic content for the region, across all areas of the media and entertainment industry including online, print, mobile, television and gaming.

Twofour54 Intaj:

twofour54 intaj has five TV production studios ranging in size from news studios to large live audience entertainment production studios.

All studios are fully equipped with the latest HD technology, with skilled technical, operational and creative staff from our highly qualified in-house team.

Each studio has a fully equipped production gallery, its own comfortable green room and allocated make-up and dressing rooms.

The sound proofed studios have full saturation lighting rigs and soft infinity 'cycs'. The large and medium sized studios have 4 x 4 metre 'elephant doors' to allow full drive-in access and dedicated scene storage areas. Outdoor production equipment is also available with Sony high-end HDCAM camcorders, model HDW-F900. They come with a comprehensive kit of audio, lighting equipment and accessories. Standard definition ENG kits are also available.

**Twofour54 Tawasol:**

Our government services department is your first point of contact when entering the Zone. Our dedicated staff will be your liaison to all government authorities, handling any government of federal procedure.



Source: TwoFour54

Membership to be awarded through competition in four categories

IFRA Invites Middle Eastern Newspapers into International Newspaper Color Quality Club

IFRA has announced that registration for contest of membership for International Newspaper Color Quality Club 2010-2012, which started in May, will continue till the end of December 2009. The competition is open to all newspapers and all newspaper printing plants, independent of the printing processes and materials used. The participation fees per title is 2400 EUR for non-members, and 1200 EUR for members.



Ifra

The qualification period will run from January through April 2010, and new club members will be announced in June 2010. The awarding ceremony will be held at IFRA Expo in Hamburg, Germany, in October 2010.

International newspapers, including those from the Middle East, can participate in one of the four categories of the competition: coldset on newsprint; heatset offset or UV curing on newsprint; heatset offset or UV curing on SC or LWC paper; and an extra category for newspapers printed on tinted paper or non-offset printing processes.

During the competition, participants will print the IFRA Cuboid test chart, which contains many color patches, once a month according to the instructions and then mail their samples to IFRA for evaluation & testing. IFRA will evaluate the general print quality of two production copies printed during the qualification period.

Advantages of participating in the competition include benefits from detailed quality evaluation reports, increased focus on consistent quality print reproduction over time, and membership in the elite International Color Quality Club.

The International Newspaper Color Quality Club (www.colorqualityclub.org) is the only worldwide quality printing competition for newspapers. It has been organised every two-years since 1994 by IFRA with the support of the newspaper associations NAA (North America, www.naa.org) and PANPA (Australia, www.panpa.org.au) as well as ZMG Zeitungs Marketing Gesellschaft, ATDL (Latin America) and ASIG (Italy), with the objective of improving the day-to-day quality in reproduction & printing at newspapers worldwide. Successful newspapers are awarded the membership for a two-year period in the exclusive club of top quality titles. In the previous competition in 2008, 198 newspapers from 43 countries participated.

Source: MEPRINTER MAGAZINE
www.meprinter.com

UAE based best-selling author, Jessie Kirkness Parker, receives Gold Gourmand award

Dubai, UAE: *A Taste of Arabia* in Arabic has been honoured with a Gold award in the Best Arab Cuisine Cookbook in the World category. Jessie Kirkness Parker is a leading expert on Gulf Cuisine having worked in the area for many years as a food editor, food stylist for film and TV, and now as a consultant in food styling and flavour.

The prestigious Gourmand World Cookbook Awards took place in Paris on 1st July 2009, at a glittering award ceremony at La Comedie Française, near the Louvre. Thousands of books were submitted by publishers and after international scrutiny, three finalists were chosen in each category.

'I am passionate about the flavours of regional recipes so I am deeply honoured to win a Gold award for *A Taste of Arabia*,' says Jessie.

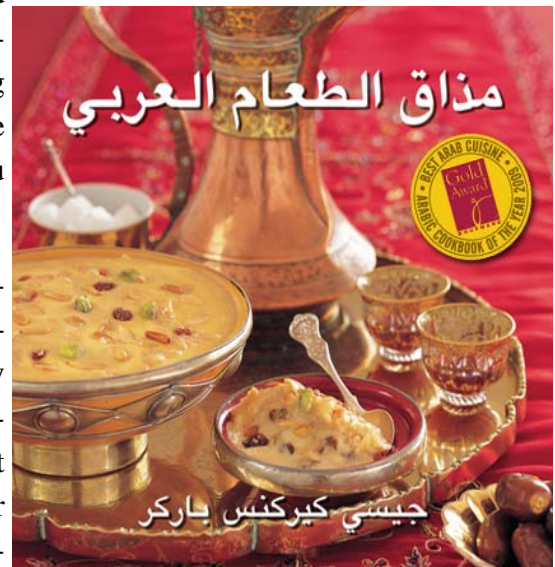
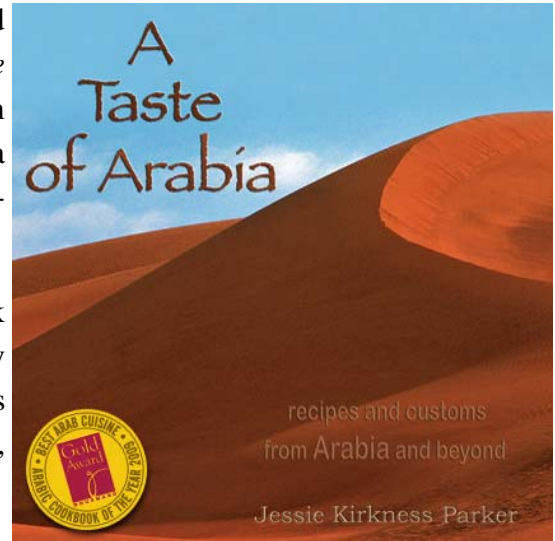
At the recent Abu Dhabi Book Fair, Kitab, Jessie felt humbled when she was embraced by many of the local ladies with compliments like 'thank you for understanding and appreciating our food and culture so well'; 'You can talk for us'; 'tell the world about our food and culture'; and 'it's delicious, you make it like we make it in our homes.'

A Taste of Arabia is a unique publication: compact and inexpensive but luxurious, combining practical recipes of the region with beautiful, expansive photography - a personal story of recipes which offer an understanding of the cultural background of the region. This bestselling title is the perfect gift for tourists to take home, practical for home cooking and for lovers of cooking - its triple tested recipes work - and a memorable keepsake of living in Arabia.

Jessie also designed and food styled *A Taste of Arabia* with pages that have great richness, and an eye for detail. Additional photographs, which are a record of the Parkers' many years in the UAE, are the perfect complement to the food photography which make even the pages look edible!

Published by Jerboa Books, *A Taste of Arabia* is available in Arabic (Dhs 59) and English (Dhs 85) at all Magrudy's Shops, Borders, Virgin, Jashanmal, Kinokuniya, Booksplus, Dubai Duty Free, Tavola and other good outlets in the UAE.

Source: JERBOA BOOKS



MMS MEDIA AND MARKETING SHOW 2009

Be the CHANGE!

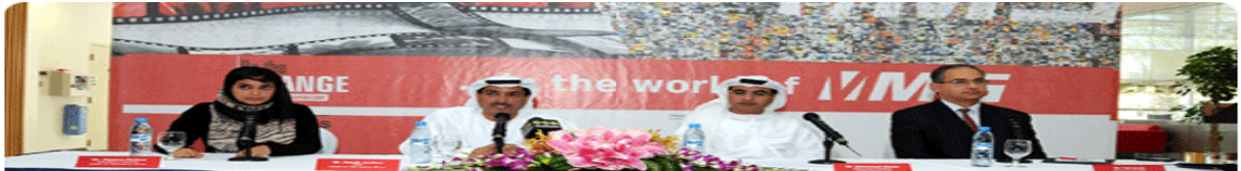
3rd - 5th November 2009
 10:00 a.m. to 7:00 p.m.
 Zabeel Hall, Dubai International Convention and Exhibition Centre, Dubai, UAE



NEWS LETTER

www.dubaimediashow.com

DUBAI MEDIA CITY & O3 PRODUCTIONS - STRATEGIC PARTNERS FOR THE MMS 2009 O3 PRODUCTIONS, MBC GROUP TAKES OVER AS THE PARTNER FOR PRODUCTION CATEGORY



The announcement was made at a press conference held at Dubai Media City in the presence of: Mr. Mohamed Abdulla, Executive Director of Dubai Media City, Mr. Fadi Ismail, General Manager, O3 Productions-MBC Group, Mr. Abdulla Abulhoul, CEO of Domus Group, and Ms. Maysoon Abulhoul, Managing Director of The Domus Group.

The O3 Productions, MBC Group will be the strategic partners for this year's Media and Marketing Show 2009 (MMS), whereas Dubai Media City continues to be the official patron. Being the region's premier event for the media and marketing industry, MMS 2009 will feature the region's leaders in the media and marketing field, content producers, service providers as well as present exciting knowledge-sharing opportunities including various seminars and conferences.

"We are in the process of signing new agreements and will soon announce partnerships with leading media research companies, publishing houses, and outdoor media providers who have shown great interest in taking part in this year's event," said Ms. Maysoon Abulhoul, Managing Director of The Domus Group who are the organisers of MMS.



Mr. Mohamed Abdulla, Executive Director of Dubai Media City

"The media industry has evolved tremendously in Dubai and the UAE since the launch of Dubai Media City – the first project in TECOM Investment's media cluster. Hosting more than 1,400 companies, Dubai Media City has played an instrumental role in the industry's growth. Through its past four editions, the Media and Marketing Show has proven to be an effective networking platform for local, regional and international media players and the event has served as a catalyst for the industry's progress in Dubai and the region."

"We are part of the MBC Group specializing in production and post-production services, and are the leading producers and distributors of content in the region. With this agreement we are glad to partner with MMS to promote and benefit not only the production industry but also the media and marketing industry as a whole. Dubai has already become the destination for international filmmakers like Warner Brothers who are setting operations in the region. We are going to see a huge boom in the production industry."



Mr. Fadismail, General Manager, O3 Productions



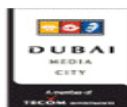
"We are very glad to celebrate the 5th edition of the Media and Marketing Show. Every year we incorporate new segments and features that we believe are essential for both our partners and visitors. Over the past couple of years we have seen phenomenal progress in both content and quality of the TV production industry. O3 Productions have been at the forefront of this trend and we are delighted to have them on board as the strategic partner for MMS 2009."

Ms. Maysoon Abulhoul, Managing Director of The Domus Group

Organiser



Official Patron



Production Market Partner



Member Of



Research Partner



In Cooperation With



Publishing Partner



THE WORLD'S ONLY MAGAZINE LICENSING FAIR

**JUMEIRAH BEACH HOTEL
2-3 NOVEMBER 2009**

In the current economic climate it is important to make the most of your budget and choose your trade shows and conferences wisely. WMM generates new business and saves publishers valuable time and money. Make sure you are planning for future revenues by attending WMM 2009. The FIPP Worldwide Magazine Marketplace (WMM) is the only event in the world designed for publishers who are interested in international licensing, joint ventures and syndication. For the first time WMM is moving to the UAE, bringing together consumer, business, specialist and digital publishers, as well as suppliers from across the globe, to network and discuss prospective cross-border publishing opportunities. Whether you are a publisher with established international magazine brands or a smaller company looking to grow your business, WMM presents an opportunity that you cannot afford to miss. Build a strong international business network, essential for global publishing success by travelling to Dubai this November.

The event will take place on **2-3 November 2009** at the **Jumeirah Beach Hotel, Dubai.**



Website: www.magazinemarketplace.com



**SIM Returns Bigger in
Second Edition**

Event Type: **Exhibition**
Period : **Annual**
From : **18-Oct-2009**
To : **20-Oct-2009**

Detail : The Signage, Imaging and Media show SIM 2009 returns this year to Abu Dhabi after a successful debut last year. The second edition of the show will be held from 18 to 20 October 2009 at the Abu Dhabi National Exhibition Centre (ADNEC). Organised by IIR Middle East, the show will address the fast-developing Middle East market and will provide a networking hub for experts and innovators across all areas of the indoor and outdoor digital printing and signage sectors.

SIM is a combination of three vertical sectors—Signage, Imaging & Media—in the form of an exhibition and three one-day forums providing a platform for manufacturers and suppliers to showcase products, solutions and services. Focus sectors of SIM include, digital printing, signage, imaging - capture, storage, processing and output, digital media, outdoor media, new media, advertising and entertainment. Over seventy percent of the exhibition space has been reserved and confirmed exhibitors include Gandinnovations, OKI, LG, Scala, SSS, Coolsign, MXN, Ola Digital, Blue Rhine, Alur Trussing & Rigging Solutions.

A new feature at SIM 09 is the Digital Printing forum — a highly focused one day forum to maximize effectiveness and profitability of printing business through training, alternate usage and industry best practices. The forum will feature key presentations from manufacturers of large format printers, printing media, inks, and related sectors. Key benefits for attendees include opportunities to learn about alternate technologies to increase profitability and reducing maintenance costs by employing best practices.

The first social media event in UAE, Social Media Forum, will run concurrent with SIM 09. The event will address how social media can be used to attract customers and drive growth in business. Highlights of the programme will be keynote speeches by the New Media director of 'Obama for America' and MySpace – Northern Europe Managing Director. (Source: MEPRINTER MAGAZINE)

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ARAB MEDIA OUTLOOK: COLLABORATING FOR GROWTH

Section Two: Regional update (PART FIVE)



In this section of Arab Media Outlook we analyse the characteristics and dynamics of the regional media markets. We focus, in particular, on factors that directly drive revenues and profitability for the sector. First, we look at the economic and demographic trends that affect all sectors of the economy but which have a particularly strong impact on the media, and then we assess the effect on the region's media sector of the global trends considered in Section One above.

Based on this analysis, we then develop illustrative projections for future circulation figures and advertising revenues in twelve national media markets: Bahrain, Egypt, Jordan, Kuwait, Lebanon, Morocco, Oman, Qatar, Saudi Arabia, Tunisia, the UAE and Yemen. For each country, we comment on how the market trends are impacted by global developments and by factors specific to the individual national markets.



Regional characteristics and dynamics

In last year's issue of Arab Media Outlook 2007-2011, we emphasised the importance of economic and demographic factors in driving media market growth. We noted that media in the region were in the fortunate position of having both of these factors provide a positive stimulus to market revenue growth.

These factors continued through into 2008. During the first three-quarters of the year, the high-income oil producers in the GCC benefited strongly from historically high oil prices and enjoyed strong economic growth. At the same time, governments in oil-producing countries continued their programmes to diversify their economies and reduce their dependence on oil revenues. The most obvious manifestation of these programmes was the surge in activity across the property sector. Along with telecommunications and financial services, the property sector was the largest spender on advertising across the region.

The consistent pattern of high GDP growth across most of the region noted in last year's outlook has continued into 2008. Table 2.1 below shows the historic and projected nominal GDP in US\$ for the twelve markets covered in this section for the years 2006 and 2007 (actual) and 2008 (projected). These projections were produced before the impact of the global sub-prime mortgage crisis on the regional economy had begun to take effect. Driven by falling demand in industrialised countries, the oil price started to fall in 2008-Q3 and by the end of the year was down to around one third of the peak level reached during the summer. The overall impact of the crisis

Table 2.1
GDP (nominal) and GDP – 2006 to 2008
(US\$ Billions)

(US\$ Billions)	2006		2007		2008	
	GDP (nominal)	GDP growth	GDP (nominal)	GDP growth	GDP (nominal)	GDP growth
Bahrain	16	17.6%	17	10.0%	20	13.1%
Egypt	107	19.6%	128	19.2%	158	23.7%
Jordan	14	11.8%	16	12.3%	19	20.8%
Kuwait	99	22.2%	112	13.0%	160	43.2%
Lebanon	23	5.6%	25	8.3%	28	13.7%
Morocco	66	10.3%	75	14.4%	90	20.4%
Oman	36	15.5%	40	13.0%	56	39.4%
Qatar	57	34.0%	73	28.7%	117	59.5%
Saudi Arabia	357	12.9%	382	7.0%	528	38.3%
Tunisia	31	6.7%	35	13.1%	42	19.3%
United Arab Emirates	164	21.4%	191	16.2%	270	41.5%
Yemen	19	13.9%	22	14.4%	28	26.3%

Source: International Monetary Fund
World Economic Outlook Database, October 2008

on the region is as yet unclear, and is beyond the scope of this outlook, but it is however clear that its effects were already being felt by the last quarter of 2008, particularly in the property sector. The downturn will affect the projections for every country examined in this section and it is most likely that this impact will be uneven, with economies most closely linked to the global economy and most exposed to movements in oil price being affected the most. As advertising tends to act as a leading indicator of economic activity, we have made the conservative assumption that for the next two years advertising revenues will grow by no more than the rate of GDP growth in all regional markets.

In 2007, reported nominal growth ranged from 28.7% in Qatar to 7.1% in Saudi Arabia. While real economic growth has been strong across most of the region, inflationary pressures have continued to cause concern with retail price inflation rates of over 10% being reported in some markets, as shown in Table 2.2. There have also been suggestions in some markets that reported inflation understates underlying inflation rates.

Table 2.2:
Consumer Price Inflation 2006 - 2007

	2006	2007	2008
Bahrain	2.2%	3.4%	4.5%
Egypt	4.2%	11.0%	11.7%
Jordan	6.3%	5.4%	15.8%
Kuwait	3.1%	5.5%	9.0%
Lebanon	5.6%	4.1%	11.0%
Morocco	3.3%	2.0%	3.9%
Oman	3.4%	5.9%	11.2%
Qatar	11.8%	13.8%	15.0%
Saudi Arabia	2.3%	4.1%	11.5%
Tunisia	4.5%	3.1%	5.1%
United Arab Emirates	9.3%	11.1%	12.9%
Yemen	18.2%	12.5%	17.2%

Source: International Monetary Fund
World Economic Outlook Database, October 2008

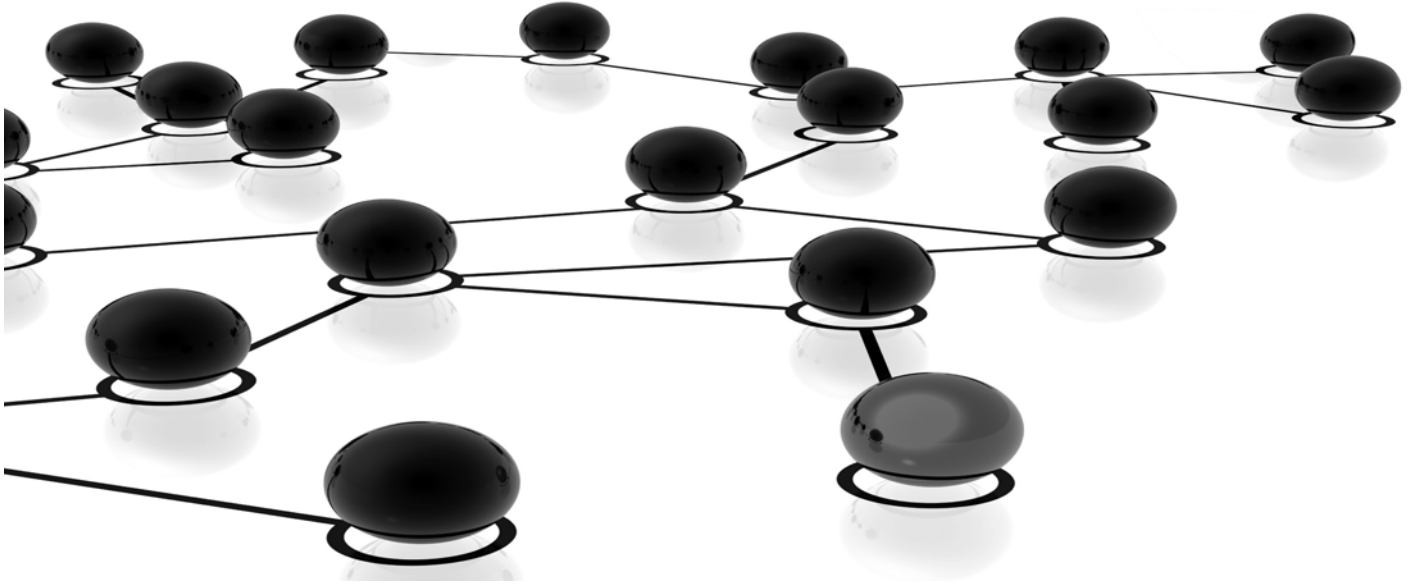
Overall, and despite the impact of inflation, strong economic growth continues to be the main driver for both consumer media spend and for advertising revenues. Similarly, the strong demographic forces benefiting the media sector continue and are particularly powerful in some of the high-growth GCC markets. As shown in Table 2.3 below, Qatar and the UAE continue to experience high levels of immigration as expatriate workers are drawn in to work on major infrastructure projects that continue to support the strong growth in the non-oil sectors, including the media.

Table 2.3
Illustrative population projections – 2006 to 2012

(Millions)	2006	2007	2008	2009	2010	2011	2012	"CAGR 07-12"
Bahrain	0.7	0.8	0.8	0.8	0.8	0.8	0.8	2.0%
Egypt	72.1	73.6	75.0	76.5	78.1	79.6	81.2	2.0%
Jordan	5.6	5.7	5.9	6.0	6.1	6.3	6.4	2.3%
Kuwait	3.2	3.3	3.4	3.6	3.7	3.8	4.0	3.6%
Lebanon	3.7	3.8	3.8	3.8	3.9	4.0	4.0	3.1%
Morocco	30.5	31.0	31.2	31.3	31.5	31.7	31.9	0.5%
Oman	2.5	2.6	2.6	2.6	2.6	2.7	2.7	1.0%
Qatar	0.8	0.9	1.1	1.2	1.4	1.5	1.7	12.4%
Saudi Arabia	23.7	24.3	24.9	25.5	26.2	26.8	27.6	2.6%
Tunisia	10.1	10.2	10.4	1.05	10.6	1.08	10.9	1.3%
United Arab Emirates	4.2	4.5	4.8	5.0	5.3	5.6	5.9	5.7%
Yemen	21.6	22.3	23.0	23.7	24.4	25.1	25.9	3.0%

Source: International Monetary Fund

World Economic Outlook Database, October 2008



When age profile is considered, the picture is even more favourable for supporting enhanced spending on media and entertainment, as shown in Table 2.4 below, which summarises the age profile for the twelve countries covered by this report.

Table 2.4
Population age profile—2007

Age Group Breakdown

(of total %)	0-14	15-24	25-34	35-44	→ 45
Bahrain	27%	17%	14%	16%	26%
Egypt	32%	19%	16%	12%	20%
Jordan	33%	20%	18%	14%	15%
Kuwait	27%	20%	27%	12%	14%
Lebanon	27%	18%	18%	16%	21%
Morocco	31%	20%	17%	13%	19%
Oman	43%	17%	13%	11%	17%
Qatar	23%	17%	15%	15%	31%
Saudi Arabia	38%	19%	21%	13%	10%
Tunisia	24%	20%	18%	15%	23%
United Arab Emirates	21%	15%	30%	22%	13%
Yemen	46%	21%	14%	7%	12%

Source: U.S Census Bureau International Database.

A common feature across all twelve markets is that young people make up a relatively high percentage of the population. In particular, over 50% of the population in Yemen, Oman, Saudi Arabia, Jordan, Morocco and Egypt are estimated to be currently less than 25 years old, while in the rest of the countries the under-25, “net generation” makes up around 35% to 47% of total population. As covered in Section One, a somewhat surprising finding from our research is that “net generations”, regardless of their geographic location or cultural background, tend to behave in a very similar way when they are online. New technologies are often second nature to them, and content delivery via online and mobile channels are probably their preferred methods given that the appropriate infrastructure is in place. Younger media consumers are also likely to spend a higher proportion of their income on media consumption than their older counterparts. This unique demographic profile of the region presents exciting opportunities for online media owners, content developers, operators, and all parties along the media value chain. In the Maktoob.com story (See Case Study) we take a look at an Arabic online portal that has successfully captured a significant group of “net generation” individuals onto a single platform.

Created By: **DUBAI PRESS CLUB**



PRICEWATERHOUSECOOPERS





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**Middle East Publishers Association
MEPA is a FZ. LLC organization with
the motto of building a society of pub-
lishers that will think and act for the
benefits of the publishing industry.**

**The aim of MEPA is to serve, promote
and protect the interest of press and elec-
tronic publishers, whilst raising the fu-
ture standards of the publishing industry
in the Middle East.**

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