Open Media and Transitioning Societies in the Arab Middle East: Implications for US Security Policy

The Stanley Foundation
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The increased presence and growth of Middle Eastern media, particularly satellite television, raises pertinent questions about the nature and influence of this information explosion. For US decision makers, the most pressing question is how the realities of expanding open media sources and transitioning societies affect issues such as the US presence in the region, regional stability and growth, democratization, and transnational terrorism. The complexity of the Middle East media landscape needs to be better understood by US policymakers if more productive security policies and solutions are to be developed. This encompasses the growing sophistication of the media outlets and audiences; how new Middle East media compares and contrasts with US media norms and trends; and what, if any, impact the media revolution has on the region's social, economic, and political realms.

In an effort to assist US policymakers and inform US expert and academic communities about the realities of expanding open media in the Middle East, the Stanley Foundation, in association with the Institute for Near East & Gulf Military Analysis (INEGMA) and the CNA Corporation (CNAC), brought together key media and policy elites from the Middle East, the United States, and the United Kingdom to discuss the implications of this Middle East media transformation. The discussions took place at an initial roundtable in Dubai in December 2005 and at a subsequent workshop in Washington, DC, in February 2006. This report summarizes the main trends, challenges, and recommendations for US policy derived from these discussions.

The Media Landscape: Trends and Challenges

External and Internal Forces Drive the Middle East Media Transformation

Much of the impetus for this new media era derives from the coverage of regional wars and civil conflicts in the 1980s and 1990s. Direct credit for the new media era belongs to strategic regional elites. Due to the small amount of foreign direct investment (FDI) and advertising dollars available, the development of media infrastructure and talent continues to rely heavily upon their support. Yet foreign pressure and influence also drive dynamic and fresh media in the region. Small states with strong ties to the United States and Europe such as the United Arab Emirates (UAE), Qatar, and Lebanon lead the media revolution. These states' more outwardly focused orientation enables each to increase its influence by using rather than suppressing change and globalization. The United States impacts regional media directly via the

The rapporteurs, Michael Kraig and Kathy Gockel, prepared this report following the conferences. It contains their interpretation of the proceedings and is not merely a descriptive, chronological account. Participants neither reviewed nor approved the report. Therefore, it should not be assumed that every participant subscribes to all recommendations, observations, and conclusions.

availability of its programming on satellite television and its foreign policy efforts, particularly in the area of public diplomacy. Paradoxically, it is the nonstrategic and unconstrained components of US media that have the strongest affect on Middle East culture and society.

Openness Does Not Pertain Equally to All Media Outlets or All States

The effects of foreign pressure and influence are not felt equally in all states or in all types of media. The "openness" of the regional media varies across the region due to the ability of regimes to censor content. Most local broadcast stations and print media are still under the control of state regimes and can be stifled and shut down more easily than satellite and Internet sources. And while it is far easier to censor local outlets—especially print sources—the transnational outlets also operate under significant constraints. Self-criticism of regimes is rare and editorializing on these stations tends to focus on transnational religious, social, and moral questions, including Islam and Arabism, or on foreign policies of outside powers such as the United States.

Outside influences and trends are most prevalent on the Pan-Arab satellite television channels such as the LBC in Lebanon, MBC and Al Arabiya in the UAE, and Al Jazeera from Qatar. These stations try to assess the entire spectrum of views and offer different voices.

Satellite Television Dominates, but Cannot Rely on Private Funding Sources

It is estimated that there are more than 200 Arab satellite channels not counting Internet broadcasts. Of these 200, only ten to fifteen are on the ratings radar and seven to nine are news channels. Western international news channels, including the BBC and CNN International, are available as is Western entertainment programming. There is relatively little data on the viewing audience and this deficiency, along with the lack of an advertising culture, contributes to regional difficulties in attracting advertising dollars. However, one regional study shows Al Jazeera as the most popular channel.

In spite of the West's emphasis on the potential effects of news channels, the majority of satellite channels offers thematic entertainment programming covering topics such as religion, music, and cooking. LBC, a channel that is profitable (unlike many others), presents entertainment programming. As in the United States, mass audiences gravitate toward entertainment.

Satellite Television as the Most Influential Medium

The mediums used to gather information vary, with traditional sources being used alongside "new" media. Two influential "traditional" sources are the mosque and the tribe/family. Seventy percent of Arabs receive their news from television, while only 1 percent uses print media. Access to the Internet is transitioning, and although its use is still most prevalent among the elites, the growth of Internet cafés is making the medium more available to the masses. Radio, in contrast to the others, is a medium mainly taken advantage of in the car.

Information is also being packaged and repackaged—content from different mediums (such as

the photos from Abu Ghraib) can be picked up and magnified via other communications mechanisms. Thus there is an inability to shut anything down—the shutdown itself sends a message.

The Dichotomy—Uniformity and Schisms

The new media era is viewed as building a regional consumer culture and a new Pan-Arab identity. This contrasts starkly with the "totalizing discourse" of former Arab pan-nationalist regimes such as those in Egypt and Syria. The intersection of the new media era with the region's increasing youth population generates a great deal of discussion. There is the potential for conflict between traditional and new information sources. Yet the ability to reconcile overlapping identities, especially by younger generations, may alleviate this tension. The media, in particular, is cited as helping people reconcile these potentially dissonant ideas. One critique is that stations do not truly know their audiences due to inadequate research, and there is no clear consensus on whether the media is driving audience views or vice versa.

A competing trend emerging is the breakdown of media channels and audiences along social cleavages. In states where media has a chance to thrive locally, such as in Iraq, there is a tendency to have specific stations for specific sects, faiths, and other groupings. There is intense debate regarding whether the transnational satellite stations represent the entire Arab spectrum culturally, politically, and intellectually. Dubai participants disagreed with US critics who felt stations such as Al Jazeera cause extremism and anti-Americanism among the larger populace. However, there was no consensus regarding whether the media should be open to all groups, especially those viewed as radical.

Thus cleavages still matter, even as most Arabs are getting their information from transnational television stations. These trends raise concerns that despite the explosion of satellite TV viewership, Arabs in different parts of the Middle East do not truly know or understand one another. The consensus is that conflict will increase as societies "connect up" to globalization.

Continued Dominance of English-Language Outlets and Markets

The English-language market is the largest linguistic market in the world even though it only accounts for around 12 percent of the world's population. English-language speakers control approximately 66 percent of the world economy, which explains why the English language dominates the mass media. According to one US participant, FDI will be critical to continue the Middle East's move toward globalization. Therefore, the region's governments, media, and publics need a better understanding of how to communicate effectively with English-speaking markets.

Growing Gulf Between US and Middle Eastern Audiences

Framing issues for audiences in the United States versus in the Middle East are a significant challenge. There are distinct differences in the messages being presented. The potential causes include audience affinity, access to information sources, and who controls the programming. Media influence predominantly flows from the United States and Britain toward the

Middle East. According to one US media participant, most Americans are not very interested in news, let alone news from a Middle Eastern outlet. Limited access to sources is another key factor. American journalists find these limitations frustrating and Arab reporters are rarely allowed access at all. Further exacerbating the situation is government control of stations and messages by regional governments and the United States. US efforts are perceived by Arabs as unidirectional. There is a need for two-way discussions that incorporate American officials learning about Arab culture, answering questions, and increasing the regional media's access to sources.

Another significant trend impacting the gap between US and Middle East perceptions of events is the decline of traditional Western broadcast and print media. Western consumers tend to turn to specific sources that support their views, such as online information aggregators' sites where one can select several news sources and stories that fit one's preferences. Helping drive this fragmentation is the corporate ownership of media sources. The focus on profits leads to a lack of news for knowledge's sake and to less than satisfactory coverage of Middle East issues.

Recommendations

Media is impacting political and economic norms in varying degrees in the region, but the consensus is that the largest impact is in the social realm. Economic and political implications are more highly debated. To date, open media has not led to political action on local issues that challenge the power of sovereign regimes. Satellite stations concentrate on transnational issues, while the majority of political and economic issues remain at the national and local levels. Thus the growing transnational civic culture being created by Pan-Arab stations is not leading to a growth in national political empowerment.

Arab media today stands at a crossroads. As both it and its audiences become increasingly sophisticated, each is impacting the other and both are hitting traditional local, state, and international policy barriers that constrain their ability to become truly open purveyors and consumers of knowledge and entertainment.

The United States has the opportunity to use its foreign policy to augment the region's own prevalent modernization and globalization trends. These policies should support better understanding between US and Middle Eastern audiences, encourage FDI and advertising in stable Middle Eastern states, and work within the existing regional media establishment to change Arab misperceptions about US objectives. US policies need to align not only with positive regional trends but also with each other.

To that end, specific policy recommendations derived from the discussions include:

1. **Decentralize US Public Diplomacy**
   - Use existing regional and international satellite stations as much as possible to promote US viewpoints. Reconsider the communications approach of Al Hurra. The perception of the station and its programming as tools for US propaganda precludes it from being effective. Use the

station to showcase truly open media—varied programming and views, including US "self-criticism"—and model the media philosophy that both the United States and much of the Arab media want to promote in the region.

- Offer and provide a variety of US programming from public and cable television as well as from the "big three" networks that show the diversity of US views on international topics. This addresses the issues of "differences in framing" for US and Middle East audiences, provides a view of the breadth of US discussion of its own foreign policy, gives greater validity to the messages, and models the democratic behaviors the United States cites as critical for the region's development.

- Develop US communication policies and programs that represent the variety of Middle Eastern identities and states rather than emphasizing the Middle East as simply the key battleground for the "war on terror." This includes dropping messaging that emphasizes "we're fighting them over there so we don't have to fight them here," which merely reinforces perceptions of "us" against "them" and characterizes the region as a generic land of terrorism.

- Place trusted public affairs officers in the field who have the ability to listen and learn as well as communicate critical foreign policy ideas. Enable these officers to communicate more freely, be more accessible, and respond more quickly via blogs, bulletin boards, and interviews.

- Provide Arab journalists with better and easier access to US sources.

2. **Emphasize Understanding Through Cultural Exchange Policies**
   - Establish government-sponsored student exchange programs, speaking tours, and guest lecturer programs between the US and Middle Eastern countries.

   - Offer more visas to populations from the region and add staff to the embassies and consulates in order to decrease the time it takes to get a visa.

   - Consider the impact on regional perceptions caused by Homeland Security policies, such as lengthy delays of Middle Eastern citizens by customs officials.

3. **Encourage Private Development**
   - Focus on developing the region's civil and business capabilities.

   - Sponsor business conferences that bring together Western and Middle Eastern media and business leaders to address development issues.

   - Recognize that advertising revenue helps free the media from its reliance on government-only sponsorship and also acts as a force for "objectivity" in reporting. Encourage advertising by multinational companies via emphasis on the size and

modern tastes of the region's Pan-Arab population, especially the burgeoning youth population.

- Establish US-based public diplomacy and media efforts to facilitate US-Arab business partnerships.

4. **Change Isolation Policies Toward Key Regional Players**
   - Recognize that the *direction* of change in the region is more important than the *degree* of change. These countries do not have to be democracies for the United States to value their movement toward greater openness. For example, the fact that the current leaders of Palestine and Iran were elected by the nation's citizens in democratic elections may be reason enough to shift toward policies of engagement with them.

   - Recognize that multilateral solutions emphasizing the role of cooperation between Middle Eastern governments and de-emphasizing US intervention are more likely to provide lasting solutions.

Conference Report

The increased presence and growth of Middle Eastern media, particularly satellite television, raises pertinent questions regarding the nature and influence of this information explosion. Who is driving this media revolution and setting the agenda—the governments, the media, the audience, international forces, or a combination of all four? How open is this new media? Does it reflect the paradigms associated with Western media—that openness exists at the local, national, and transnational levels and covers all forms of media from print to the Internet to broadcast outlets? What challenges and barriers do media outlets confront in their efforts to bring modern technology and programming to a region where this type of access is considered new and even threatening to some audiences, including many regional governments?

The focus from outside the region tends to concentrate on broadcast news channels, and in particular Al Jazeera. Yet within the region, a variety of entertainment and religious programming is available across a variety of mediums. What are the implications of expanding information access both from within and outside the region at the same time that a "youth bulge" is occurring?

For US decision makers, the most pressing question is how the onset of expanding open media sources and the reality of transitioning societies affect issues such as the US presence in the region, regional stability and growth, democratization, and transnational terrorism. The complexity of the Middle East media landscape needs to be better understood by US policymakers if more productive security policies and solutions are to be developed. This encompasses the growing sophistication of the media's purveyors and consumers; how new Middle East media compares and contrasts with US media norms and trends; and what, if any, impact the media transformation is having on the region's social, economic, and political realms.

In an effort to assist US policymakers and inform US expert and academic communities about the objective realities of expanding open media in the Middle East, the Stanley Foundation, in association with the Institute for Near East & Gulf Military Analysis (INEGMA) and the CNA Corporation (CNAC), brought together key media and policy elites from the Middle East, the United States, and the United Kingdom to discuss the implications of this Middle East media transformation. This initiative grew out of the Stanley Foundation's programming on Middle East security and the US-Muslim relationship. The discussions took place at an initial roundtable in Dubai, United Arab Emirates (UAE), in December 2005, and a subsequent workshop in Washington, DC, in February 2006. The objectives of these meetings were to define the issues, discuss their ramifications, outline policy implications for the United States, and make a first contribution toward a larger national dialogue on these and related

issues. This report summarizes the main trends, challenges, implications, and recommendations for US policy derived from these discussions.

The Media Landscape: Trends and Challenges

External and Internal Forces Drive the Middle East Media Transformation

The rise of the Arab media is a relatively new phenomenon, although much of the impetus came from the coverage of regional wars and civil conflicts in the 1980s and 1990s. Lebanon's civil war led to the development of an entrenched media infrastructure in order to promote the ideas of competing militias. Post-war, this infrastructure and media knowledge helped foster the transition to a competitive, diverse media industry. The dominance of the coverage of the 1991 Gulf War by a Western media channel, CNN, led to two key effects: it opened Arab eyes to the way in which real life crises and conflicts can be covered and it also created consternation and frustration at the predominance of Western perspectives in the coverage of a regional event. In response, Saudi elites started BBC-Arabic. Although this station eventually shut down, it was the precursor to current regional satellite stations Al Jazeera and Al Arabiya. The contribution of regional talent from the BBC also helped make this transition possible, and the British broadcaster's imprint on regional talent is still evident.

Foreign pressure and influence continue to drive dynamic and innovative media in the region. But it is the small states with strong ties to the United States and Europe, such as the UAE, Qatar, and Lebanon that are truly leading the media transformation. Their smaller geographic size and the fact that they are surrounded on all sides by stronger cultural, economic, and military powers have led to stronger ties with the West and a greater acceptance of globalization. This more outwardly focused orientation enabled each state to increase its influence within the region and internationally by using rather than suppressing modernity and globalization. This ultimately led to the creation of the strongest Pan-Arab media outlets: Al Jazeera, Al Arabiya, and LBC. Faster global integration by some states reflects a DC participant's prediction that integration into the globalized world will occur on a state versus regional basis and will be a significant motivator for other states and governments to also integrate into the global environment.

The United States continues to have a strong influence on international and regional media in the Middle East through both its business and government sectors. US television programming is popular and widely available on Middle Eastern satellite television channels and the US government has established its own satellite television channel, Al Hurra. However, the top-down attempt by the US government to influence the region through Al Hurra only attracts 1 percent of the regional audience and, in general, is viewed by Arab citizens as a tool of the US government. The State Department is also undertaking public diplomacy efforts under Karen Hughes and the US military embeds reporters with its forces and uses public relations firms to project positive stories to media outlets in Iraq.

Even though foreign influence continues to be a significant driver of the regional media transformation, direct credit belongs to strategic elites from states such as Lebanon, Saudi Arabia, Qatar, and the UAE. Due to the small amount of foreign direct investment (FDI) and advertising dollars available in the region, the development of media infrastructure and talent continues to rely heavily upon the support of these regional elites. The most popular regional news channel, Al Jazeera, is not profitable. One Middle Eastern media participant shared that the station would have starved in its infancy without state funding due to the lack of outside funding and the ban on advertising by some countries in the region.

Openness Does Not Pertain Equally to All Media Outlets or All States

The effects of foreign pressure and influence on this new media era are not felt equally in all states or in all types of media across the region. Most local broadcast stations and print media are still under the control of state regimes and can be stifled and shut down more easily, and with less effect, than broadcast media and Internet sources. As mentioned previously, outside influences and trends are most prevalent on the Pan-Arab satellite television channels located in smaller states such as the LBC in Lebanon, MBC and Al Arabiya in the UAE, and Al Jazeera from Qatar. These stations can be characterized as libertarian more than Islamist or Arabist in that they try to assess the entire spectrum of different views and offer different voices. For example, on these channels, Egyptian and Saudi clerics are joined by liberals of a more secular orientation or who have a more progressive view of Islam and modernity. Criticism of the domestic practices of past leaders of the Arab world, including Egypt and Syria, are accepted as normal. Coverage of Iraq shows violence against both Americans and Iraqis. As regional media participants shared in both sessions, the media is breaking previously established information taboos. Now, there is a drive to present the news "as it actually is," even if this means sharing stark, highly ideological views that might be regarded in Western countries as politically incorrect.

However, transnational stations are not above state censorship as demonstrated by the manner in which the Egyptian and Syrian authorities are reacting to coverage of their internal affairs. While Hezbollah in Lebanon has its own media outlets and the leaders of Hamas are interviewed on various channels, Egypt did not allow coverage of the Muslim Brotherhood during its recent elections. Egyptian authorities also harassed, constrained, and temporarily jailed Al Jazeera reporters who attempted to show the clashes between police, regime supporters, and the Muslim Brotherhood. Syria closed down the Al Arabiya office in Damascus and routinely attempts to jam signals. A participant in the Dubai dialogue also noted that the state apparatus in Syria sends out false "quotes" from individuals in the free media in an attempt to discredit these individuals. It also sends hecklers to participate as audience members.

Ironically, Saudi Arabia, one of the first governments to sponsor a satellite channel, also employs censorship when its strategic interests are at stake. In 1998, around the time of Desert

Fox, Saudi authorities disallowed coverage by hundreds of MBC reporters because the Saudi regime did not like or trust Saddam Hussein and felt that coverage of the US bombings might be viewed negatively by Arab audiences. In response, most of the MBC reporters quit and moved to Al Jazeera.

This government regulation also helps explain why the Internet is the medium of choice for the most radical regional groups such as Al Qaeda—because it is easier to establish and shut down a Web site, the medium is much more difficult to track, monitor, and regulate than traditional broadcast and print mediums. Indeed, one of the findings of the Dubai discussions was that the Western perception of lack of control on broadcast stations is incorrect. Currently, many US citizens and political elites alike seem to believe that mainline broadcast channels such as Al Jazeera help Al Qaeda and other militants by airing highly objectionable material, including beheadings of kidnapped prisoners. However, this is false. The Internet is more widely used by these transnational cells to advocate their message, not the larger cross-national satellite stations funded by regional governments.

Overall, the "openness" of the regional media varies due to state ownership of media outlets and the ability of regimes to censor content. It is far easier to censor local outlets, especially print sources, but the transnational outlets also operate under significant constraints. Also, as one participant noted, self-criticism of Arab actions at both the personal and regime level are still rare, due to both cultural and political factors. Policy and social critique are strong on these stations, but the nature of the critique tends to be on transnational religious, social, and moral questions such as Islam and Arabism, or on foreign policies of outside powers such as the United States, rather than on cutting local issues. For instance, the government of Qatar does not allow coverage of pressing and contentious social and political issues such as labor policies for immigrant workers.

Satellite Television Dominates, but Cannot Rely on Private Funding Sources

Middle Eastern broadcast participants at the DC workshop estimated that there are more than 200 Arab satellite channels, not counting Internet broadcasts. Of these 200, only ten to fifteen are on the ratings radar (these are monthly ratings versus the day-to-day ratings common to the United States) and only seven to nine are news channels. Western international news channels, including the BBC and CNN International, are also available as is Western entertainment programming. A Middle Eastern media participant noted that this broad array of channels is due to the fact that many wealthy elites are establishing their own channels because having one connotes prestige. The participant also predicted future industry consolidation since not all of these channels can survive.

There is relatively little data on the viewing audience and this deficiency, along with the lack of an advertising culture, makes it difficult to attract advertising dollars within the region. One participant in the UAE dialogue shared that the estimate of advertising dollars per capita in the

Middle East is $160 versus $370 in the United States. Participants at the DC workshop estimated available commercial funding at $1.2 billion to $1.8 billion for the 22 countries in the region, and most of that money goes to the news channels. The breakdown of funding between Middle Eastern and Western news channels was not provided.

Data from a study regarding the popularity of Middle Eastern news channels was provided at the Dubai roundtable. The results of the study—which was conducted in Jordan, Lebanon, Morocco, Saudi Arabia, and the UAE—demonstrated the reach of Al Jazeera. Forty-five percent of respondents watched the channel, with 12 percent watching MBC and LBC respectively. Al Arabiya captured 9 percent, Abu Dhabi 6 percent, and Hezbollah 4 percent. The US government-sponsored network, Al Hurra, captured 1 percent. In some countries Al Jazeera is even preferred over state television. Fifty-six percent of respondents in Egypt preferred Al Jazeera, compared to 10 percent for the country's national television stations. The numbers were similar in the UAE, with 57 percent watching Al Jazeera and 10 percent watching Abu Dhabi television. Overall, Al Jazeera and Al Arabiya were the stations most likely to be turned to as a second choice by most survey respondents.

It was noted that a key difference between Pan-Arab stations such as Al Jazeera and local stations was the presentation of confrontational debates on sensitive issues that affect the entire region on a transnational or international as well as a national basis, including outside intervention by Western states. In turn, many US and regional participants at both events argued that this is directly contributing to the formation of a new sense of cross-national Arab and Islamic identity. Social and cultural connections between disparate populations are being established via this internationalist programming on the most popular satellite broadcast stations and a shared sense of community is slowly but surely growing.

Yet, as stated earlier, there are still constraints on what can be shown and the topics that can be covered. As one participant from the region noted, perhaps there is so much focus on US foreign policy because the stations cannot look at the region's *own* social issues very closely.

In spite of the emphasis in the West on the potential effects of news channels, the majority of satellite channels offer thematic entertainment programming, covering topics such as religion, music, and cooking. The moneymaking LBC is an entertainment channel. As in the United States, mass audiences gravitate toward entertainment. Some of the most successful programming also follows Western themes such as reality television and contests similar to *American Idol*.

Media and Audience Sophistication Pertains Mainly to Satellite Television

The mediums used by the Middle Eastern public to gather information vary, with traditional sources being used alongside "new" media. The two traditional sources emphasized as influential were the mosque and the tribe/family. The central role of the mosque in shaping opinion, via both messages delivered by religious leaders

and information distributed outside, is particularly important to Islamic male audiences. (Satellite television was also cited as a means for providing religious information and opinion, with women comprising the largest audience for religious programming.) The importance of the human voice in tribal and family discussions was highlighted by one regional academic, as was the significant impact that these social structures have on what information sources are used, and how the information is interpreted.

There is an imbalance in the use of more formalized media sources. Seventy percent of Arabs throughout the Middle East get their news from television. The dominance of satellite TV has significant social implications. One participant shared that "those who lack dishes are often viewed by neighbors as ignorant." Only 1 percent of Arabs use print media. Even in Lebanon, which has one of the most educated populaces and dynamic civil societies in the region, there are millions of TV viewers but only 30,000-40,000 newspaper subscribers. Access to the Internet is also expanding. Although its use is still most prevalent among the elites, the growth of Internet cafés is making the medium more available to the masses. Participants at the Washington conference emphasized that there is a real interest in having completely uncensored and uncontrolled access to this information, especially on the part of the younger generations. With such a large section of the population below 30 years old, Internet usage will become even more prevalent. Radio, in contrast to other popular mediums, is something mainly taken advantage of in the car.

The current imbalance in the use of various media outlets in the Middle East can be traced to factors such as:

- The importance of the human voice to the culture.
- The variance in literacy rates across the Arab world—70 percent cannot read or write and only 1 percent regularly read newspapers.
- Print sources are more easily shut down since they are inherently local and most are state-owned.
- Internet access is still relatively expensive and not as uniformly available as television. The fact that it is the preferred information source for radical political movements may also have some effect on states' willingness to make it more widely available.

However, as pointed out by one US media analyst, information is now getting packaged and repackaged in many ways. Content from different mediums, such as the photos from Abu Ghraib, the Danish cartoons, and videos from extremist groups, can be picked up and magnified via other communications mechanisms. This inherently means that there is significance in shutting down sources of information—the shutdown itself sends a message, and those who have already accessed the information can distribute it through other communication mechanisms.

A critique heard at the Dubai roundtable was that stations do not truly know their audiences

due to inadequate research. Many asked which was pushing and which was pulling, which was shaping and which was being shaped—the audience or the networks? There was no clear consensus on this issue. Some felt strongly that the "new Arab" was young, global, consumer-oriented, and savvy to the biases of particular news sources. Others felt that the audience tended to be a captive of the three or four major transnational satellite stations and that these stations significantly shaped public attitudes on major issues. Clearly, this is a question that requires more focused and methodologically sophisticated research. A Dubai participant argued that UNDP should augment its current Arab Human Development Report process by adding in an entirely new project on assessing the impacts of regional media, including the objective realities of audiences across countries.

The Dichotomy—Uniformity and Schisms

Some participants saw media as building a regional consumer culture, but most saw it in the broader context of identity. The intersection of this new media programming and access (via the Internet as well as television) with the region's "youth bulge" generated a great deal of discussion. The "circles of affinity," as described by an American academic in the DC workshop, are changing. The professionalism of the commentators, the topics and forums used, and the ability to reach an entire generation across the region are making the media circle of belonging "warmer"—there is a greater sense of trust, familiarity, loyalty, and reciprocity. These attributes were traditionally allocated to more local affiliations such as the tribe and family.

Another American analyst stated that "it is the youth and those who are parents of teenagers who will define the future. How do you reconcile a traditional patriarchal system with the new media norms? What kinds of grownups are these people going to be?" Another participant felt that social institutions, such as the family, can morph to mean other things and that "one should not underestimate these things or see them as constraints—they are quite adaptable." At the same time, there was concern about "contrived authenticity" and the prospect of forcing identity systems onto a person.

Although some participants saw a potential for conflict between traditional and new information sources and trends, US analysts emphasized the notion of overlapping identities—the ability of the people, especially younger generations, to reconcile the notions of what it means to be modern, Arab, Islamic, a member of a state, and a member of a tribe/family at the same time. One analyst even spoke of entertainment programming as "aspirational" and emphasized how it actually helps people reconcile these various identities so that they are not dissonant by giving Arabs from different states a common perception of what it means to be Arab. For the first time, there is a source offering a "uniform" Arab language, presenting facts that the "average" Arab should know, and enabling a glimpse of what life is like throughout the region.

There was support from both discussions that the media was helping create a new Pan-Arab identity. This was contrasted with the "totalizing discourse" of old Arab pan-nationalist regimes, such as Egypt and Syria, in which citizens were

treated as objects rather than subjects and the state apparatus "told people what they needed to know" during the Cold War years rather than sharing all information on a given subject.

However, another competing media trend is also emerging—the breakdown of media channels and audiences along social cleavages. There was fairly intense debate regarding whether the transnational satellite stations represent the entire Arab spectrum culturally, politically, or intellectually. Many Gulf participants at the Dubai roundtable stressed that although money tends to come from the Gulf Arab monarchies, the talent—specifically producers, editors, writers, anchors, interviewers, and interviewees—tend to come from Levant countries such as Lebanon, Jordan, and Egypt. In the view of Gulf participants, the experts brought on to talk shows from the Gulf are merely a cosmetic attempt to show balance and even then comprise small rotations of a select few individuals. The one exception has been the large number of Saudis interviewed on Al Arabiya, which is ultimately funded by the Saudi government.

In discussions of perceived imbalances in coverage, none of the Dubai participants agreed with the views of US critics who feel that, by giving airtime to conservative Islamists, stations such as Al Jazeera actually cause extremism and anti-Americanism among the larger populace. They also did not feel that this type of programming was a major driver of negative attitudes toward the United States. Participants at the DC workshop were not all in agreement with this view.

As one DC participant shared, Al Hurra was established "in an effort to expand the landscape of debate" since many of the stations are state-owned or set up by the sons and daughters of rulers who are in charge of privatization. This participant felt that until there is a truly independent Arab media, the subjectivity in reporting will not change, and an indicator of true independence would be the attendance of multinational companies at Middle Eastern media conferences.

US groups are not alone in their critiques of coverage. Regional groups also feel that their concerns are not covered objectively and that some treatment of sensitive topics is even hostile. Women's views are perceived as given short shrift on various stations. The Shia in Iraq feel that Al Jazeera's coverage is anti-Sistani. The Saudis are annoyed that their attempts to liberalize are sometimes portrayed on Al Jazeera as "giving in to US demands." In states where media has a chance to thrive locally, such as Iraq (which was cited by one participant as being the most free, dynamic, and growth-oriented market in the Middle East), there is a tendency to have specific stations for specific sects, faiths, and other groupings.

There was no consensus even from regional media participants regarding whether the media should be open to all groups. Some felt that one cannot have open media and exclude Islamist groups. Others felt it was dangerous to give violent groups access to major media coverage. One regional media participant in the DC conference shared, "The greatest danger is the prospect that, through clever manipulation and public

relations, programs or even whole channels can be hijacked by extremists or fundamentalists across the social and political spectrum. If this were to happen, it would be bad for all aspects of society as well as the media."

Thus cleavages still matter, even as most Arabs are getting their information from transnational television stations. These trends raised concerns that despite the explosion of satellite TV viewership, Arabs in different parts of the Middle East still do not truly know or understand one another beyond their shared attitudes toward issues such as Israel, Palestine, and US intervention. For instance, does the average Lebanese citizen really "know" or understand the average Qatari or other Gulf Arab citizen, or vice versa? Several participants were skeptical of this claim.

Overall, as noted by one participant in the DC workshop, there will be increasing conflict as societies "connect up" to globalization. This participant, a leading analyst on globalization and security, suggested that there will be an attendant rise in nationalism, with uncertain or unpredictable consequences. Despite this uncertainty, however, he felt it was possible to integrate Middle Eastern countries into the global system and cited Asia as an example of how this can occur over the long term.

Continued Dominance of English-Language Outlets and Markets

A Western media participant shared that the English language is the largest linguistic market in the world, even though it only accounts for around 12 percent of the world's population. This is due to the fact that English-language speakers control approximately 66 percent of the world economy, and this economic dominance explains why the English language also dominates the mass media. He also felt that this was why Al Jazeera is starting an English-language channel. Also, as one participant suggested, FDI will be key in helping the Middle East continue its move toward globalization. Therefore, the Middle East will need to better understand how to communicate with these English-speaking markets if it is to attract more foreign investment. This is a large challenge, as demonstrated by the US media coverage surrounding the proposed management of American ports by a Dubai-based company.

Difficult to Reach a Broad Audience With News That Reflects a Variety of Perspectives

Another significant challenge impacting the understanding of and dialogue around Middle East issues is the decline in traditional broadcast news viewership and print readership in the West. Americans "do not want much news or analysis." One US media representative at the DC workshop stated that Americans are "totally focused on ourselves—we're egocentric" and that that the Middle East should not look to American media for much understanding of the region's issues. The appearance of broadcast channels and programs dedicated to a single point of view such as FOX News and *Hardball*, enable audiences to pay attention only to stories and viewpoints that interest them.

Relating to and helping drive this fragmentation is the corporate ownership of media sources. According to one member of the US

media, these corporations focus on profits and this focus on the bottom line leads to a lack of news for knowledge's sake. It also contributes to a lack of expertise within the broadcast journalism field. US news outlets used to have foreign correspondents that focused on specific areas of the world. Today the goal is to become an anchor. To that end, news correspondents spend a short amount of time in any one region and do not know or learn the language. This leads to less than satisfactory coverage of the issues from the Middle East point of view.

Another media participant stated that he would not put any more money into increasing newspaper subscriptions and would instead focus on the electronic market. Newspaper circulation is declining and, due to the variety of online information aggregators, American and international audiences can select several news sources and types of stories to view at one Web site. This participant stated that the new goal is to ensure that your outlets and stories are one of the two to three chosen by audience members through these sites. This trend is shifting power from those reporting on and providing the news content to the aggregators who "own the eyeballs."

The corporate focus of news outlets combined with this fragmentation of the audience is leading to a press that reflects more of what its corporate owners and audiences want instead of journalistic principles. As one international media participant stated, "We reflect. We don't create. We're not good at educating our own publics in the US and England."

Increasing Polarity Due to Different Framing

The difference in framing issues for audiences in the United States versus those in the Middle East is another challenge for both US and Middle Eastern media. The potential causes for these differences are many, including audience affinity, access to information sources, and who controls the programming.

Media influence today predominately flows from the United States and Britain toward the Middle East. Even though some Arabic channels and shows can be seen in the United States, and although Western news outlets pick up stories from Middle Eastern stations, most Americans are not that interested in watching news, let alone news from a Middle Eastern outlet. The launch of Al Jazeera's English language station will be a good test to see whether an Arab station can generate American interest. However, Al Jazeera faces a huge challenge in overcoming the negative brand associations derived from its showing of videos from radical Islamist groups as well as the US government's less-than-positive responses to its programming. At the DC event, one participant attributed a story to Al Jazeera that the station's representative did not remember being part of the station's formal coverage. The comment was also made that stories are often attributed to the station even when it was not the source of the story.

Access to sources was a key factor cited by one journalist, who used the US military action in Iraq as an example of how difficult it is for all reporters to get the information necessary to accurately frame a story. The only safe way for

an American journalist to get access is to be embedded with the US military. Even then it is difficult to gain access to, and the consent of, people who can explain the complexities of the situation on the ground. These explanations also tend to contain a lot of "spin," which leads American journalists to question the accuracy of the information. Compare this to the fact that Arab journalists are not invited to participate in these types of activities. As the participant stated, if American journalists with direct access do not trust the information, then what is an Arab reporter to think of information passed along secondhand?

Further exacerbating this situation are US efforts at public diplomacy. These efforts are perceived by Arabs as unidirectional with the goal of changing Arab perceptions, rather than accepting Arab culture as a given and creating a truly two-way discussion that incorporates American officials learning about Arab culture, answering questions, and increasing the regional media's access. One participant shared that during one of Karen Hughes' first visits to the region she stated that she was there to "do everything but talk about problems with US policies." In this participant's view, her efforts at public diplomacy had already failed.

Finally, due to state ownership, there are limits as to what can be shown on Arab stations, and in most cases, the state is the final arbiter as to what can and cannot be shown. As one participant noted, perhaps one of the reasons for the substantial focus on US involvement in the region is the fact that self-criticism is still not prevalent in Middle East programming. A similar effect is happening in the United States even though the media outlets are not state-owned. According to one member of the US media, the White House realized during the Reagan administration that by having a daily briefing it could often set the daily political news agenda. In this participant's view, the American media needs to find a way to get beyond the White House public relations spin because it is crowding out other stories that should be covered.

Implications

Opinions varied regarding the type and degree of impact that the transformation of Middle East media is having inside and outside of the region. However, there were several topics upon which most participants agreed and these were in the social realm. Economic and political implications were more highly debated, with the economic impacts receiving the least attention. To date, media openness has not led to concrete political action on local issues that challenge the power of sovereign regimes. Satellite stations concentrate on transnational issues. The majority of political and economic issues remain at the national and local levels. Thus growing transnational civic culture is not leading to a growth in national political empowerment. This gap may cause mounting frustration and even conflict in the future.

Dramatic Impact on Social Conventions and Norms

The discussion revealed that the greatest effects of the new era of Middle Eastern media are being felt in the social realm. Pan-Arab satellite television stations broke Western media dominance, both in terms of outlets and coverage and, as one

participant shared, "There must have been euphoria when the Arab public saw on TV what few saw on the Western media."

Another consensus that surfaced among participants was that these stations now talk to people across the region as if they are all one community. In this regard, the trans-regional media is building a new Pan-Arab identity. This is an interesting phenomenon considering the Pan-Arabism of the 20th century is most often linked to political leaders and elite-level issues. The nature of the current media discourse was also contrasted with the traditional "totalizing discourse" of Arab pan-nationalist regimes such as Egypt and Syria, in which citizens were treated as objects rather than subjects, and the state apparatus "told people what they needed to know" during the Cold War years rather than sharing information on a given subject.

Caution was also recommended regarding how fast the Middle East media should "open." Participants noted that the Middle East does not have the same media history as the United States. The established context of democratic knowledge that existed during the American Revolution does not exist in the Middle East. Therefore, the same actions at the same pace are likely to foster different outcomes.

The rise of new identities, the previously mentioned social and ethnic-sectarian schisms that are appearing in television programming, and the fact that democracy and openness are new to most members of the region are all sources of concern regarding future conflict. To summarize one Middle Eastern media participant, television is the number one interactive tool of the masses and it is unleashing the power of the masses as demonstrated by 9/11 and the Danish cartoon reactions. As such, it might create instability in the short term. This is due to the fact that the media is part of a larger system—culture and society—and, thus, has limitations on it due to the context in which it exists. However, in the long term, he felt that the media's impact will lead to more security because it is promoting norms across the region.

The participants also stressed that creating viable civil societies in the Middle East cannot be accomplished by the media alone. There are limitations on its operations. The ability to successfully navigate social transitions will rely on other players from the citizenry and governments. The United States needs to acknowledge that these social transitions place the Middle East media and its government supporters in a somewhat tenuous situation since social transitions often cause conflict. The current perceptions of the United States in the region suggest that US policies need to take a supporting role in these transitions. If US policies drive the action, it will be perceived as meddling in internal affairs, which can, in turn, lead civil society and governments to turn against the region's positive trend toward openness and citizen involvement. As a Middle East media participant shared, these changes need to come from *within* if they are to be lasting changes.

The regional media is also impacting Western perceptions and policies. The coverage of events by Pan-Arab stations along with Internet con-

tent offer access to perspectives not covered in the West. Al Qaeda and other radical groups are savvy to this and use the media to promote their efforts. Some of these groups are trying to establish what it means to be Islamic and Arab. Meanwhile, the way in which this content is covered by members of the media, government, and American public (through, for example, blogs or Internet sites) appears to be driving greater polarization in Americans' perceptions of the Middle East, Islam, and Arabs.

Divergent Views Regarding Media's Impact on Politics and a Continuing Trend Toward Openness

The reach of satellite television and increasing penetration of the Internet make it much harder for governments at all levels to shut down messages. It is also making it easier for groups to move a message to the people—picking up information from one source and distributing it through another, such as the "repackaging" of the Danish cartoons. The power of the image is not lost on governments, either. The coverage of the Danish cartoon protests from countries such as Syria, which many think were encouraged by the government, revealed how the media can be used as a pawn. The generation of compelling images can be a call to action regardless of who initiates that call.

The actions toward the media taken by governments—both those within the region and internationally—are evidence that political regimes feel the media is having significant influence. Where this will lead is under debate. Some feel that there is forward momentum toward a more open media. Others feel that the future could lead to more censorship. One regional media participant mused that as political regimes come under pressure they will take steps to protect themselves.

Middle Eastern media is also driving US policy initiatives. One recent example is the US government's reaction to Lebanese satellite station Al Manar, radio station Al Nour Radio, and the parent company Lebanese Media Group. The US government felt that these media players were assisting Hezbollah. Therefore, the US Treasury responded by designating each as a terrorist entity. This designation freezes their assets in the United States and prohibits US citizens from transacting with them. At the same time, the US government set up its own channel in the region to ensure its views are being shared. Participants felt that these and other US efforts are largely perceived as restricting truly open media at the same time that the United States is setting up its own propaganda mechanisms.

The same can be said for the governments within the region. Even though most open Middle Eastern regimes may be fine with criticisms of the United States and showing videos from radical groups, many participants felt that the coverage of the domestic actions of media-sponsoring regimes (such as Qatar) by the regional media was too limited.

The actions of the media itself were also cited as contributing to the demise of openness through the generation of its own propaganda (which drives out sponsors who object to subjective coverage) and the media's emphasis on conflict and

crises. One Middle Eastern participant shared how the media was used to call people to action in Lebanon's Cedar Revolution. It was felt that the media was a "purposeful mobilizer" and there was "passive self-censorship," which emphasized coverage of those who were anti-Syrian. The media chose to sacrifice its objectivity. Some felt this was important in order for Lebanon to regain control of its own affairs. Others felt that the overall drive of Pan-Arab news media should be to tell the news as the news is. As a Dubai participant shared, the press in this case became the "revolutionary vanguard," and when it does this it becomes counter-propaganda. "Yesterday we decried propaganda. Now we are saying there is good propaganda and bad propaganda." What are people to believe is real?

Thus the debate regarding how much the media does and should impact politics is ongoing. A common theme was that this transition, along with social transitions, will probably lead to further conflict between the regimes and the media. Whether public attitudes and engagement will be enough to override state censorship remains to be seen.

Economic Impact Is Still To Be Determined

There was agreement that the Pan-Arab media is helping to create a new consumer culture and common identities both within and across generations. At the same time, career opportunities are limited by the lack of regional development, particularly from foreign investors and multinational corporations. So many young Arabs can now see a world that they may perceive is beyond their reach. One US analyst felt that FDI was the critical factor needed to shrink that gap.

At the same time, instability in the region, media images of radical groups, the high trade barriers, and the lack of venture capital were all mentioned as factors keeping investors away. Another key factor for broadcasters is that advertisers do not want to be associated with a cause or run afoul of the administrations in their own countries. Multinational clients fled Lebanon when the Cedar Revolution coverage became so prominent. One participant felt that objectivity was critical to attracting investment. Conversely, subjectivity would keep it out and even drive it away.

US media coverage is also having a huge impact on the willingness of the American people to trust allies from the region. The Dubai Ports deal became a political football. Too few Americans could separate the United States' relationship with the UAE from US relations with Iran, Iraq, and Syria, let alone the question of whether or not UAE elites are tacitly supporting terrorists such as Al Qaeda. Many of the recent US political campaigns focused on generalized notions of terrorism and regional conflicts in such a way that a Middle Eastern company having responsibility for *managing* a port was perceived as giving a Middle Eastern company responsibility for *securing* a port, which was not acceptable. This one incident points to the fact that the American public and Middle Eastern companies have a lot to learn about one another and that perceptions created by mass media are important. In this one example, a generalized perception of an Arab, Islamic, and "rogue regime" threat in the United States led to a

suboptimal foreign policy outcome for both the Bush administration and the leaders of the UAE, who are friends and supporters of the US security role in the region.

Conclusions and Recommendations

There is no doubt that the transformation of Middle Eastern media is impacting social, political, and economic norms in varying degrees. It stands today at a crossroads. The Arab media and its audiences are becoming more sophisticated. As this sophistication builds, it is becoming more difficult to determine which is driving the other—the media or the audience. As a comparison point, the US media was in a similar place in the near past, but today's perception is that its corporate owners and audiences are driving the programming. It remains to be seen whether Arab media will follow the same trend, maintain its drive toward openness and objectivity, or move in a different direction. What is readily apparent is that the region's media and audiences are hitting traditional local, state, and international policy barriers that are constraining their ability to become truly open purveyors and consumers of knowledge and entertainment.

What this means for US policy is that policymakers need to constantly assess the landscape by region, by country, by audience, and by medium. One of the key ideas taken from the Washington workshop is that globalization is proceeding person by person, community by community, and cannot be mapped by large areas of the globe. The acceptance of openness and globalization is uneven within populations, and as one American participant pointed out, some Middle Eastern audiences are far more "connected" than some US audiences. US policymakers need to emphasize that some of the conflict seen in the region is about globalization and societal transitions and less about a "clash of civilizations."

Trying to influence the Middle East by using typical American public relations spin, restricting access to sources and networks, establishing new US government-backed information sources, and forcing change from the outside will not bridge the gap between the United States and the Middle East, at either the government or civil society levels. The audiences are too savvy and have too many other sources from which to gather information. These tactics run counter to what the United States says are its policy goals. The obvious conflict between US messages and US actions is driving the United States and the Middle East further apart and making it even harder for regional players trying to facilitate peaceful change.

The United States has the opportunity to use its foreign policy to augment the region's own prevalent modernization and globalization trends. These policies should support better understanding between US and Middle Eastern audiences, encourage FDI and advertising in stable Middle Eastern states, and work within the existing regional media establishment to change Arab misperceptions about US objectives and vice versa. US policies need to align not only with positive regional trends but also with each other.

To that end, specific policy recommendations derived from the discussions include:

1. **Decentralize US Public Diplomacy**
   - Use existing regional and international satellite stations as much as possible to promote US viewpoints. Reconsider the communications approach of Al Hurra. The perception of the station and its programming as tools for US propaganda precludes it from being effective. Use the station to showcase truly open media—varied programming and views, including US "self-criticism"—and model the media philosophy that both the United States and much of the Arab media want to promote in the region.

   - Offer and provide a variety of US programming from public and cable television as well as from the "big three" networks that show the diversity of US views on international topics. This addresses the issues of "differences in framing" for US and Middle East audiences, provides a view of the breadth of US discussion of its own foreign policy, gives greater validity to the messages, and models the democratic behaviors the United States cites as critical for the region's development.

   - Develop US communication policies and programs that represent the variety of Middle Eastern identities and states rather than emphasizing the Middle East as simply the key battleground for the "war on terror." This includes dropping messaging that emphasizes "we're fighting them over there so we don't have to fight them here," which merely reinforces perceptions of "us" against "them" and characterizes the region as a generic land of terrorism.

   - Place trusted public affairs officers in the field who have the ability to listen and learn as well as communicate critical foreign policy ideas. Enable these officers to communicate more freely, be more accessible, and respond more quickly via blogs, bulletin boards, and interviews.

   - Provide Arab journalists with better and easier access to US sources.

2. **Emphasize Understanding Through Cultural Exchange Policies**
   - Establish government-sponsored student exchange programs, speaking tours, and guest lecturer programs between the US and Middle Eastern countries.

   - Offer more visas to populations from the region and add staff to the embassies and consulates in order to decrease the time it takes to get a visa.

   - Consider the impact on regional perceptions caused by Homeland Security policies, such as lengthy delays of Middle Eastern citizens by customs officials.

3. **Encourage Private Development**
   - Focus on developing the region's civil and business capabilities.

- Sponsor business conferences that bring together Western and Middle Eastern media and business leaders to address development issues.

- Recognize that advertising revenue helps free the media from its reliance on government-only sponsorship and also acts as a force for "objectivity" in reporting. Encourage advertising by multinational companies via emphasis on the size and modern tastes of the region's Pan-Arab population, especially the burgeoning youth population.

- Establish US-based public diplomacy and media efforts to facilitate US-Arab business partnerships.

4. **Change Isolation Policies Toward Key Regional Players**
   - Recognize that the *direction* of change in the region is more important than the *degree* of change. These countries do not have to be democracies for the United States to value their movement toward greater openness. For example, the fact that the current leaders of Palestine and Iran were elected by the nation's citizens in democratic elections may be reason enough to shift toward policies of engagement with them.

   - Recognize that multilateral solutions emphasizing the role of cooperation between Middle Eastern governments and de-emphasizing US intervention are more likely to provide lasting solutions.

Participant List

Dubai Dialogue 1
Middle East Security in an Era of Open Media and Transitioning Societies

Dubai, United Arab Emirates

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Organizers
Riad Kahwaji, Founder and Chief Executive Officer, Institute for Near East & Gulf Military Analysis (INEGMA)

Michael Kraig, Director, Policy Analysis and Dialogue, The Stanley Foundation

Participants
Ayman Abdel Noor, Political Analyst and Independent Researcher

Ibrahim Al-Abed, Director, Emirates News Agency

Badr Al-Hinai, Ministry of Foreign Affairs, Sultanate of Oman

Ibtisam Al-Kitbi, Assistant Professor of Political Science, United Arab Emirates University

Rashed Al-Oraimi, Managing Editor, *Al-Ittihad*, UAE

Abdellatif Al-Sayegh, CEO Arab Media Group

Assad Al-Shamlan, Professor of Political Science, Institute of Diplomatic Studies

Abdullah Al-Shayji, Associate Professor of Political Science, Kuwait University

Tarek Ayntrazi, Chief Executive Officer, Future Television

Jamil Azar, Senior Anchor, Al Jazeera Television

Jassim Azzawi, News Anchor, Abu Dhabi Television

Khaled Batarfi, Managing Editor of Al-Madina Press Establishment

Marwan Chukri, Director, Foreign Press Office, Lebanon Ministry of Information

Andreu Claret, Director-General, European Institute of the Mediterranean

Michael Connell, Research Analyst, Center for Strategic Studies, The CNA Corporation

Nakhle El-Hage, Editor in Chief, Al Arabiya Television, Lebanon

Sami Faraj, President of the Kuwait Center for Strategic Studies, State of Kuwait

Peter Grimsditch, *The Daily Star*, United Kingdom

Amjad Haddad, Executive Director, The Middle East Forum for Human Rights, Jordan

Christopher Isham, Chief of Investigative Projects, ABC News

Fadi Ismail, General Manager, O3 Production, MBC Group

Salah Khalil, Ibn Khaldun Center for Development Studies

Jamal Khashoggi, Media Advisor to Saudi Arabia's Ambassador to the United States

Rami Khouri, Editor at Large, *The Daily Star*; Syndicated Columnist

Marwan Kraidy, Assistant Professor of International Communication and International Relations, School of International Service, American University

David L. Mack, Vice President, Middle East Institute

Taieb Mahjoub, Editor in Chief, AFP Gulf Regional Office

Ramez Maluf, Director, Beirut Institute for Media Arts, Lebanese American University

Marwan Matni, Senior Producer, LBC-Hayat Television

Khawla Mattar, Professor of Mass Communications, Bahrain University

Nada Mourtada-Sabbah, Associate Professor, Political Science and International Studies, American University of Sharjah

Jamil Mroue, Editor in Chief/Publisher, *The Daily Star*

Salah Nagm, Director, Middle East News, MBC Group

Julia Nanay, Senior Director, Country Strategy Group, PFC Energy

Walid Noueihed, Editor in Chief, *Al-Wasat*, Bahrain

Shad Omar, News Anchor, LBC-Hayat Television

Dina Osman, Reporter/Producer, Nile TV, Cairo

Walter Pincus, National Security Staff Writer, *The Washington Post*

John H. Sandrock, Director, Program on International Security, The Atlantic Council of the United States

Lee Smith, Independent Media Analyst and Researcher

Hesham Youssef, Office of the Secretary-General, League of Arab States

Affiliations are listed for identification purposes only. Participants attended as individuals rather than as representatives of their governments or organizations.

Participant List

Dubai Dialogue 2
Middle East Security in an Era of Open Media and Transitioning Societies

The CNA Corporation, Alexandria, Virginia

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February 9-10, 2006

Organizers
Mary Ellen Connell, International Affairs Group, Center for Strategic Studies, The CNA Corporation

Michael Connell, Research Analyst, Center for Strategic Studies, The CNA Corporation

Michael Kraig, Director, Policy Analysis and Dialogue, The Stanley Foundation

Michael McDevitt, Director, Center for Strategic Studies, The CNA Corporation

Eric Thompson, Director, Middle East Programs, International Affairs Group, Center for Strategic Studies, The CNA Corporation

Rapporteur
Kathy Gockel, Associate Program Officer, The Stanley Foundation

Participants
Jon Alterman, Director, Middle East Program, Center for Strategic and International Studies

Jane Arraf, Edward R. Murrow Fellow, Council on Foreign Relations

Jamil Azar, Senior Anchor, Al Jazeera Television

Thomas P. M. Barnett, Senior Strategic Researcher, Decision Strategies Department, Center for Naval Warfare Studies, and Director, *NewRuleSets.Project*, US Naval War College

Dale F. Eickelman, Ralph and Richard Lazarus Professor of Anthropology and Human Relations, Asian and Middle Eastern Studies, Dartmouth College

Emile El-Hokayem, Research Associate, Southwest Asia/Middle East Program, The Henry L. Stimson Center

Mouafac Harb, Executive Vice President, Director of Network News, Alhurra

Fadi Ismail, General Manager, O3 Production, MBC Group

Riad Kahwaji, Founder and Chief Executive Officer, Institute for Near East & Gulf Military Analysis (INEGMA)

Anatol Lieven, Senior Research Fellow, New American Foundation

David L. Mack, Vice President, Middle East Institute

Nada Mourtada-Sabbah, Associate Professor, Political Science and International Studies, American University of Sharjah

Julia Nanay, Senior Director, Country Strategy Group, PFC Energy

Dina Osman, News Anchor and Producer, Nile Television

Walter Pincus, National Security Staff Writer, *The Washington Post*

Martin Walker, Editor, English Language Operations, UPI

The Stanley Foundation Staff
Jeffrey G. Martin, Director of Programs and Executive Vice President
Kristin McHugh, Program Officer
Keith Porter, Director of Communications and Outreach

Affiliations are listed for identification purposes only. Participants attended as individuals rather than as representatives of their governments or organizations.

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The Stanley Foundation
209 Iowa Avenue
Muscatine, IA 52761 USA
563-264-1500
563-264-0864 fax
info@stanleyfoundation.org

Institute for Near East & Gulf Military Analysis (INEGMA)

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