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Arab Media Systems

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6. Saudi Arabia: From National Media to Global Player

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A combination of geopolitics, religion, and economics have shaped the media of Saudi Arabia. The country's media structure began as a national broadcasting system in the 1960s, alongside a well-established privately-owned Arabic-language press, and had by the 1990s evolved into a regional system of Arabic- and English-language outlets. This made Saudi Arabia the media superpower of the Middle East. The ascent of Crown Prince Mohammed bin Salman in the 2010s ushered in an era of direct control of both news and entertainment media. As a result, Saudi government influence over Arab media has grown more expansive and more direct. The desire to clamp down on dissent globally led to the disastrous killing of Jamal Khashoggi and the resulting global uproar has affected the stature of Saudi Arabia. Nonetheless, Saudi Arabia's media face multiple challenges, including the difficult-to-control, burgeoning digital media environment, and the tensions arising between the kingdom's political and economic priorities.

Background

Located in West Asia, the Kingdom of Saudi Arabia occupies most of the Arabian Peninsula. The modern kingdom was founded in 1932 by King Abdulaziz Al-Sa'ud, known as Ibn Sa'ud. Because Saudi Arabia is a large country bordering other smaller states, including Qatar, the United Arab Emirates, Bahrain, Oman, and Yemen, and located across

waterways from several other states, its geography grants it dominance in neighborly relations. Since the Islamic Revolution in Iran in 1979, Saudi Arabia has been locked in a battle with Iran for geopolitical influence over the Middle East, in which ideology and religion play an important role, with Saudi Arabia being a conservative monarchy and the cradle of Sunni Islam, and Iran being a revolutionary republic and the center of gravity of Shi'a Islam.

If geography appears to predestine Saudi Arabia for regional influence, geology provides the decisive elements of economic and geopolitical power that extend far beyond Saudi Arabia's borders: hydrocarbons and other minerals. With arable land making up 1.5% of the territory, and irrigated land a mere 16,300 square kilometers, agriculture is a relatively small contributor to the Saudi economy. However, the Saudi land is rich in hydrocarbons and minerals, chiefly natural gas, petroleum, iron ore, and gold. The abundance of underground mineral wealth has, since the 1930s, made Saudi Arabia one of the leading economies of the world, and provided it with geopolitical tools that have made it a great power in the Middle East, and the broader Islamic world. Mineral wealth is also the bloodline for Saudi's national media sector and its regional and global extensions.

Religion is another source of Saudi transnational power. Long before the discovery of oil, gas, and minerals, another force shaped the rise of Saudi statehood, society, and culture: Islam. Saudi Arabia is the birthplace of Islam, the world's second largest religion, with nearly two billion adherents across the globe, and remains closely associated with the religion. Mecca and Medina, the two holy cities central to Islamic history and Muslim identity, are located in Saudi territory, and millions of Muslims visit every year to perform the *hajj*, or pilgrimage, that is one of the pillars of their religion. Not only is Islam closely associated with Saudi Arabia, it is also foundational to the rise of the modern Saudi state, based on a politico-clerical regime. Saudi Arabia is the only country in the world to be named after a single family, the Al-Sa'uds, who forged a historical power-sharing agreement with the Al-Shaykh family. According to this ruling *quid pro quo*, the Al-Sa'uds have full power over domestic politics, defense, and security, and foreign policy, whereas the Al-Shaykhs control religious and educational institutions.

A combination of geography and demographics poses a national cohesion problem for Saudi rulers. Because of Saudi Arabia's large area, the country has a low population density of 15 inhabitants per square kilometer (Trading Economics, 2019). The population retains strong local and tribal identities; thus, ever since Ibn Sa'ud decided to establish a wireless network in the 1920s, Saudi rulers have regarded national media, particularly television, as a crucial instrument for creating and sustaining feelings of national belonging. In this context, it is important to recall that Saudi Arabia hosts a large community of (mostly Asian) foreign workers who, by some estimates, fill two thirds of all jobs in the kingdom. Since 2017, authorities have imposed taxes and labor restrictions on foreign workers, cutting their number by 20% from 2017 to 2019 (AsiaNews, 2019). Moreover, the country is a desert kingdom with only a few major cities connected by thoroughfares. Most of the population is concentrated in the middle of the Arabian Peninsula, in and around the metropolitan areas of Dhammam to the east, the capital, Riyadh, in the center, and the Mecca-Medina area to the west.

Saudi Arabia's history, as well as its media, has been shaped by geography, geology, and religion—the desert, oil, and Islam. In such a large, tribally fractured, and sparsely inhabited country, where mass communication historically plays a vital role in maintaining national identity, Islam is the connective belief system—the software—and the media system is the hardware that keeps Saudi Arabia cohesive. "Cohesion" is a relative term in this context, because the Saudi ruling bargain monopolizes power in the hands of Sunni Muslims, making the sizeable Shi'a minority (estimated at 15% to 25% of a total population of approximately 34 million) into second-class citizens. In fact, the Saudi version of Islam, known as *wahhabiyya*, is puritanical and excludes Shi'a Muslims and others who do not follow stringent Sunni-Salafi tenets. As such, a strict version of Sunni Islam is at the heart of Saudi nationalism and cultural identity. When one considers that media technologies, by exposing societies to foreign ideas and images, tend to be harbingers of cultural shifts and social change, and that *wahhabiyya* insists on a pure Sunni Islam unadulterated by alien values, it is not surprising that Saudi media have since the beginning been a battleground between modernization and change, on the one hand, and doctrinal purity and social homogeneity, on the other. Moreover, the rise of Crown Prince

Mohammed bin Salman in 2017, and his firm grip on all aspects of
Saudi life, suggests a new authoritarian consolidation of power with the
Al-Sa'ud.

Historical Developments

The beginning of Saudi media can be traced to 1908, when Lebanese,
Syrian, and Turkish journalists operated the country's first newspapers
in the Western province of Hijaz, the site of Islam's holy cities of Mecca
and Medina (Rugh, 1980). Newspapers were critical of political leaders
in the first three decades of the twentieth century, but when Ibn Sa'ud
founded the kingdom in 1932, the press came under the sway of the
Al-Sa'ud ruling family and turned its focus away from politics and
towards poetry and literature. Since that time, newspapers have reflected
the importance of royally dictated public consensus. As Saudi Arabia
experienced the first oil boom and ensuing modernization of the state
in the 1950s, newspapers prospered and grew more outspoken again,
especially in Jeddah, the commercial center, and the most socially liberal
city in the kingdom. The government cracked down in the late 1950s,
shutting down the most critical dailies and merging others (Kraidy,
2010).

The so-called "Faisal Era," named after Ibn Sa'ud's son Faisal
who ruled as the Saudi monarch from 1964 to 1975, is a significant
historical period in the development of Saudi media, and ironically,
Faisal's assassination was at least partly inspired by his introduction
of television to Saudi Arabia (Kraidy, 2009). The reason lies in its
coupling of expansion with repression. In 1962, Saudi Arabia had no
magazines and only three newspapers, with a combined distribution of
25,000 copies (Rugh, 1980). In the 1960s, after several journalists were
banned from writing in the country, the press grew more quiescent. In
the 1970s, according to the Ministry of Information, the "common goal"
of the government and the press was to develop the country, so Saudi
journalists were "called upon" to write in support of that objective
(Rugh, 1980, p. 85). With rising literacy rates and a growing economy,
by 1976, Saudi Arabia had seven Arabic-, and two English-language,
dailies (Rugh, 1980).

The siege of the Grand Mosque in Mecca by radical militants in 1979 led the royal family to consolidate its grip on the media, and prompted further repression of the press in the 1980s. Official Saudi media did not announce the incident on the day it occurred, and the government jammed the signal of *Radio Monte Carlo Middle East*, then a widely followed news source in the kingdom (Boyd, 2001). Later, Saudi television carried a speech by Prince Nayef bin Abdulaziz, Minister of the Interior, and showed footage of rebels who had been taken prisoner. In July 1981, a royal decree announced a new Higher Media Council and put Saudi media and information policy under the control of the Minister of the Interior (Boyd, 2001). Today, the Saudi press consists of more than a dozen daily newspapers, mostly concentrated in the capital Riyadh, which is home to *Al-Riyadh*, *Al-Sharq*, and *Al-Jazeera*, and in the Red Sea city of Jeddah, which hosts *Okaz* and the two English-language dailies, *Arab News* and *Saudi Gazette*.

Wireless and radio communications emerged from the nation-building imperative. In the mid-1920s, as Ibn Sa'ud was consolidating his grip over what would become the Saudi kingdom, he considered wireless communication crucial for his ability to control his growing dominion, so he commissioned the construction of radio facilities. The country's archconservative clerics expressed fierce opposition to wireless technology, fearing it would subvert religion. To persuade them that wireless communication would actually propagate God's word, the king had Qur'anic verses read aloud and transmitted between Riyadh and Mecca in both directions (Boyd, 1999, p. 145). Ibn Sa'ud, who believed that media and communications were central to the modernization of the desert kingdom, would go on to cunningly negotiate with the clerics every time a new media technology came on the scene. Ibn Sa'ud introduced radio into Saudi Arabia in May 1949, and installed his son Faisal as supervisor of the new station (Boyd, 1999, pp. 145–46).

Saudi authorities first tested a national television broadcasting service on 17 July 1965. Before then, the two television stations operating in the country were not Saudi: One, *AJL-TV*, had been run by the US Air Force since 1955 (Boyd, 1999), and another had been operated by the Arabian American Oil Company (ARAMCO) since 1957 (Rugh, 1980). The state-run *Al-Saudiyya* (Saudi Channel One) was originally launched in 1963 as the flagship Arabic-language channel, and it switched from

black-and-white to color in 1976. The English-language *Saudi Channel 2* went on the air in 1983 (Kraidy, 2013). By 1975, Saudi television reached 1.5 million viewers (out of a population of around seven million) (Kraidy, 2013).

In 1991, as the Gulf War roared on, viewers in Saudi Arabia who had access to hotels tuned in to *CNN*, while Saudi soldiers on the front were exposed to both Saddam Hussein's propaganda and Egyptian government messaging through the Egypt Satellite Channel (Kraidy, 2010). In response, Saudi rulers allowed close family members and business associates to launch *MBC* from London in 1991, inaugurating the Arab satellite "revolution" (Kraidy & Khalil, 2009).

The mid-2000s witnessed important developments in Saudi media, particularly television. Since the beginning of satellite television in the early 1990s and the demonstrated success of channels such as Qatar's *Al-Jazeera* in news and Lebanon's *Lebanese Broadcasting Corporation* in entertainment, a recurrent preoccupation of Saudi officials has been to reform Saudi television to win back Saudi viewers from non-Saudi broadcasters. This entailed a "modernization" drive for Saudi television, resulting in the 2003 launch of *Al-Arabiya*, a pan-Arab news channel owned by the MBC Group and based in Dubai, and the 2004 launch of *Al-Ekhbariyya*, a Saudi national round-the-clock news channel (Kraidy, 2013), in the wake of terrorist attacks in the kingdom. As in the 1980s, changes in television policy reflected the government's desire to be able to provide coverage at a time of crisis.

In 2018, spurred by Prince Mohammed bin Salman's focus on media and entertainment in his Vision 2030 strategic framework, Saudi Arabia launched a new channel, *SBC*, both the acronym and the name of one channel within the Saudi Broadcasting Corporation, which was designed to "lure young viewers and project a modern image beyond the kingdom's borders" (Sanjar & Harissi, 2018). Daoud Al-Sherian, a renowned Saudi columnist and talk show host on *Al-Arabiya*, was recruited to head the new channel. He made it clear that the channel's objective was to fulfill components of Vision 2030, most notably to "complement the changes seen in the kingdom in the artistic, cultural and entertainment spheres" (Sanjar & Harissi, 2018). *SBC* was developed as the entertainment flagship channel to be added to a religious channel,

an educational channel, and the news channel *Al-Ekhbariyya*, all under the aegis of the Saudi Broadcasting Corporation.

Political System and Legal Framework

The foundations for the current regulatory framework for Saudi media were established by Faisal, who became the king in 1964, and expanded Saudi media and regulatory institutions. These included the Ministry of Information in 1962 (renamed as the Ministry of Culture and Information in 2003, and as the Ministry of Media in 2018), a new Press Code in 1964, and the Saudi News Agency in 1971. However, these official institutions have never been the only forces shaping media policy. When they feel sidestepped by the royal family, Saudi clerics feel empowered enough to make public statements about the television industry (Kraidy, 2009). Every year during Ramadan, the holy month and most important season for the media market, several Saudi clerics are vocally critical of television programs that do not adhere to their strict standards (Kraidy & Khalil, 2009).

As such, the Saudi religious establishment constitutes an influential media policy institution that counteracts the "liberal" tendencies of media owners, journalists, and intellectuals, resulting in culture wars between the two camps. In exchange for their political support after the siege of the Great Mosque, clerics were allowed to severely limit the role of women in Saudi media. Their voices clamored for censorship in the name of religious morality during culture wars about literature, reality television, music video, and, more recently, social media.

Even with a clerical establishment capable of influencing media policy on social issues, Saudi media follow directives from the Ministry of Media on all political issues. The Ministry "works in an active role by identifying and preserving the Saudi identity, spreading Islamic values in the Saudi citizen's life, expressing the achievements of Saudi Arabia... [and contributing] to raise... awareness" (Ministry of Media, 2019). The Minister of Media, like other cabinet members, is appointed by royal decree. Among the Ministry's tasks, as laid out on its website, is the assurance that the media are a "strategic tool" that enables the kingdom to "deal with media attacks from abroad" and to "generate national belonging" domestically (Ministry of Media, 2019).

Television outlets are run by the Saudi Broadcasting Authority, whose head reports to the Ministry of Media. Relevant laws and regulations include the Regulation for the Protection of the Rights of Authors, or copyright law, the Regulation for Press Institutions, or the press law, the Regulation of Publications and Publishing, and the masterplan Media Policy of the Kingdom of Saudi Arabia, in addition to various regulations concerning legal implementation.

Since Saudi media, particularly television, is intricately connected with the larger pan-Arab media system, Saudi Arabia has actively tried to influence the transnational Arab political and regulatory environment. This was clearest when in 2008 Saudi Arabia and Egypt advocated the so-called Arab Satellite Television Charter, prompted by televised attacks on Saudi leaders during the 2006 war between Israel and Hezbollah, mainly by the *Al-Manar TV* channel, and the rise of pro-Muslim Brotherhood channels, such as Hamas's *Al-Aqsa TV*, which made the Egyptian government feel threatened. On 12 February 2008, in an emergency meeting of Arab Information Ministers in Cairo, the charter was officially adopted. Covering news, talk shows, entertainment, and sports, the charter gave Arab governments instruments to penalize satellite channels for criticizing leaders, harming the "national reputation," and disseminating morally undesirable content (Kraidy & Khalil, 2009).

After a decade of more or less business as usual, the Saudi media sector was poised for radical change once Mohammed bin Salman was named Crown Prince and quickly set out to develop Saudi Vision 2030. In that ambitious plan to wean the Saudi economy off of fossil fuels, media and entertainment figured prominently, but as instruments for economic growth and social pacification, and not as platforms of free expression. Indeed, in October 2018, the Saudi journalist Jamal Khashoggi walked into the Saudi Consulate in Istanbul to take care of some paperwork, and there he was brutally murdered. What followed was one of the biggest global media events of 2018. The Saudi government first denied any knowledge of what had transpired, but then admitted that Khashoggi died by accident in a fist fight, after Turkish intelligence agents leaked information to the media that Saudi agents dispatched from Riyadh had killed Khashoggi inside the consulate. Finally, in September 2019, Prince Mohammed bin Salman took "full responsibility" for the death, because "it happened under my watch," on a US television news show (Maxouris,

2019). The Saudi government has an unfortunate history of tracking, kidnapping, or liquidating dissident journalists and exiled princes worldwide, but for the US political elite, killing a journalist working for a US newspaper of record such as *The Washington Post* crossed a red line. This shocking killing has had a chilling effect on Saudi journalists.

Economy and Ownership Patterns

A peculiar political economy rules Saudi media. As an absolute monarchy, Saudi Arabia's media hew closely to the editorial line set by the palace. The royal family's grip on the media has shifted over the decades, but under King Salman and his son Crown Prince Mohammed, political autocracy has hardened, and the country's media have become little more than platforms for Saudi domestic and foreign policy. Historically, royal princes have also been media owners, sometimes indirectly, by association with non-royal businessmen, but often through direct ownership of newspapers and television channels. As such, Saudi public discourse, including those media outlets that express the viewpoints of various princes, has generally reflected a consensual view of the royal family. This changed drastically with the elevation of Mohammed bin Salman to the position of Crown Prince and *de facto* ruler of Saudi Arabia. Under his leadership, Saudi politics has undergone a radical narrowing of the margins of discourse, and Saudi media ownership has become increasingly consolidated in the Crown Prince's hands.

After this consolidation, the Saudi state is now the dominant media owner in the country, and whatever media the royal family does not own, it controls—the Saudi royal family *is* the Saudi state. The Saudi government owns and operates all terrestrial and satellite television channels based on Saudi territory. The state-run Broadcasting Service of the Kingdom of Saudi Arabia (BSKSA) is in charge of all television activities, and private television channels are prohibited from satellite broadcasting from Saudi soil unless they are fully controlled by the government, or partially owned by royal princes. Though the media ownership patterns of Saudi companies operating on Saudi soil remain rigid, the ownership of transnational Saudi media, such as *MBC*, *Rotana*, and *ART*, typically based outside of Saudi territory, initially reflected

a shift from government ownership to government-controlled private ownership.

Recent changes notwithstanding, private Saudi media ownership is a well-established phenomenon. In 1975, the Saudi brothers Hisham and Mohammed Ali Hafez launched the Arab world's first English-language daily, *Arab News*. The sons of a Jeddah publisher, the two brothers would go on to establish the Saudi Research and Marketing Company as one of the largest Arab media conglomerates (Loqman, 1997). In late 1975, the Lebanese Civil War forced the Lebanese publisher Kamel Muruwwah to shut down the respected Beirut-based English-language newspaper *Daily Star*, leaving in its wake a group of unemployed journalists and editors experienced in publishing an English-language daily in the Middle East. *Arab News* recruited the group led by Jihad Al-Khazen (Lebling, 2005), who edited *Arab News* before going on to lead the two major Saudi-owned, London-based pan-Arab papers, *Asharq Al-Awsat* and *Al-Hayat*.

As always, the creation of Saudi media initiatives and institutions was driven by geopolitical threats. The Saudis stepped into the transnational realm as a reaction to external threats, starting with the media war against Egypt in the 1960s, and developed a formidable transnational media capacity through various companies that it controlled or influenced. An effective media system was also needed internally because inhabitants of the Eastern Province were watching television from Kuwait, Iran, Qatar, and the UAE (Rugh, 1980). These two factors—economics and security, the latter including rhetorical and military conflicts—continue to this day to shape the Saudi involvement in the pan-Arab media system, and most likely drove Mohammed bin Salman's inclusion of media moguls in his 2017 "economic purge" of the Saudi elite.

On 5 November 2017, authorities arrested dozens of the kingdom's royal, political, and business elite. In a series of choreographed moves, security forces sequestered members of the elite for various charges of corruption. Among the detainees were media moguls Prince Al-Waleed bin Talal (*Rotana*), Saleh Kamel (*ART*), and Walid Al-Ibrahim (*MBC*), three men who have shaped Saudi media and the Arab satellite boom (Kraidy, 2015). This move by the Crown Prince, who is himself considered a media mogul since his family owns one of the largest Arab media conglomerates, Saudi Research and Marketing Company,

thus increased his control. As a result, contemporary Saudi rulers are increasingly exerting direct media control, politically and economically, in news and entertainment. Entertainment is central to the Crown Prince's Vision 2030 strategic framework. In 2016, a royal decree created the new General Entertainment Authority, and in 2017, the Public Investment Fund of Saudi Arabia announced that USD 2.7 billion had been earmarked for entertainment media. By putting pressure on the media moguls mentioned above, the Crown Prince is gaining financial leverage over some of Saudi Arabia's richest men, thereby concentrating an astonishing amount of Arab media power in his own hands, and positioning himself to control a nascent entertainment sector that is poised to grow explosively in the near future.

Technology and Infrastructure

A comprehensive media and telecommunications infrastructure was essential to transform a tribally fractured and geographically dispersed population into a national community ruled by the House of Sa'ud. This became all the more important when inhabitants of the Eastern Province started receiving television signals from Kuwait and Iran, and later from Qatar and the United Arab Emirates (Rugh, 1980). During the Gulf War in the early 1990s, inroads made by *CNN* and, later in the decade, by *Al-Jazeera*, spurred continuous infrastructural developments in Saudi Arabia.

Founded in 1926 as the Post, Telegraphs and Telephones Directorate by King Abdulaziz, who was conscious of the centrality of post and telecommunications for state building, "and the necessity of using modern inventions in this sector to link the vast and remote areas of the kingdom with each other," the Saudi Ministry of Communications and Information Technology has undergone several makeovers and name changes, and currently focuses on "Empowering Digital Saudi" (Ministry of Communications and Information Technology, 2019b).

Much of the kingdom's current telecommunications infrastructure that hosts most Saudi digital activity took shape in the mid-2000s, particularly in 2006 and 2007. The year 2006 was a watershed for the Ministry of Communications and Information Technology: it (1) launched a national 3G mobile telephone service, (2) restructured

national Internet service provision, moving it from King Abdulaziz City for Science and Technology and placing it under the authority of the Communications and Information Technology Commission, and (3) finalized the Anti-Cyber Crime Law, and got it approved. The following year, 2007, saw (1) the adoption of the First National Communications and Information Technology Plan, (2) the approval of a National Spectrum Plan, and (3) the establishment of the Universal Service Fund, dedicated to financing information infrastructure that connects remote rural areas to the kingdom's national grid (Ministry of Communications and Information Technology, 2019b). Since Crown Prince Mohammed bin Salman ascended to the effective leadership of the country, the Ministry has focused on "Empowering Digital Saudi," as its motto claims on its official website, by organizing events and workshops to develop Saudi citizens' digital skills and instructing all Saudi companies and public services to do the same, as stipulated in the Framework to Empower Digital Skills of Saudi Youth, released in October 2019 (Ministry of Communications and Information Technology, 2019a).

The Saudi political economy of mobile telephony is a state-private hybrid. The leading operator, *Saudi Telecommunications Corporation* (*STC*), is 70% state-owned and 30% privately-owned, and the second-, third- and fourth-largest companies (respectively, *Mobily*, *Zain*, and *Bravo*) feature owners or majority shareholders who are close to the Saudi, Kuwaiti, or UAE government. Though they are generally considered as Gulf-based, rather than strictly national companies, they have had global holdings since at least 2013, when *STC* operated in Turkey and Indonesia in addition to Bahrain and Kuwait (Rasooldeen, 2013).

Contemporary Saudi Arabia has some of the highest connectivity and social media use rates in the world. According to the latest available report by the Saudi Communications and Information Technology Commission, fixed broadband service penetration is 33.6%, while mobile broadband penetration is 93.5%, and Internet services penetration is 82% (Communications and Information Technology Commission, 2017). However, if all modalities of connectivity are taken into account, mobile and Internet penetration approached 100% in 2018, according to the General Authority for Statistics (Mubasher, 2019). Saudi Arabia also has a high penetration of social media. As of October 2019, Saudi

Arabia had more than ten million *Twitter* users, roughly one-third of the population (Statista, 2019).

Saudi Arabia indirectly controls one of the most valuable media and information infrastructures in the Middle East: *ArabSat* and its network of satellites. The Arab Satellite Organization was founded in 1976 by the 21 member-states of the Arab League. Reflecting the outsize Saudi role in bankrolling *ArabSat*'s expensive infrastructure, the organization was headquartered in Riyadh, the Saudi capital (Kraidy & Khalil, 2009). One of the largest satellite operators in the world and the Arab world's leader in that domain, *ArabSat* owns and operates six satellites that carry more than 500 television channels, 200 radio channels, several pay-television networks and more than 95 high definition channels and services.

In the 2000s, in order to make Saudi television the first choice for the Saudi viewer, Saudi media officials initiated a reform of media policy directed at invigorating programming, upgrading infrastructure and facilities, and training personnel. In 2007, a systematic modernization of Saudi television, the first since its founding in the 1960s, was guided by a committee of experts at the Ministry of Culture and Information. Officials took advantage of the *hajj* to introduce several innovations, including live news reporting, more exciting graphics, and new logos (Al-Khulayfy, 2007; Hawari, 2008). On-air presenters were instructed to be more informal, and live shots from iconic sites in the kingdom were shown (Al-Khulayfy, 2007). Ten new programs were introduced, including the very first program on Saudi state television that integrated viewer participation (Kraidy, 2013). Reforms continued to be implemented in 2009, when the Ministry announced it would build production and transmission facilities in all regions of the country, move all television transmission to high definition, gradually introduce digital broadcasting for terrestrial television, and create a broadcasting archive (Al-Khulayfy, 2007). There was a defined goal to "establish local media that serve all the regions of the country" (Al-Hamady, 2009). Funds were disbursed to set up radio and television production infrastructure in every province of the country (Kraidy, 2013). Existing channels got a face-lift: the logos and technical capacities of *Saudi Channels 1* and *2*, and *Al-Ekhbariyya*, were upgraded.

Challenges

The Saudi media system faces several challenges. First, the development of Saudi media institutions has followed a clearly *reactive* historical pattern. The 1979 siege of the Great Mosque in Mecca by radical armed Islamists led to a consolidation of the royal family's grip on the press and widespread repression in the 1980s. *MBC* was allowed to begin pan-Arab satellite broadcasting from London in 1991 to provide a Saudi-controlled alternative to *CNN*'s coverage of the first Gulf War. *Al-Arabiya* went on air in 2003 as a direct competitor to *Al-Jazeera*, and was tasked with fending off the Qatari channel's attacks on Saudi Arabia in the wake of the 11 September 2001 attacks, and their global repercussions. *Al-Ekhbariyya* was launched in 2004 for the government to be able to control, or at least contribute to, the news narrative following terrorist attacks inside the kingdom. Thus, the current phase, where an increasingly large share of Saudi national and transnational media is coming under the personal control, directly or indirectly, of Crown Prince Mohammed bin Salman, is the culmination of a half-century trend of consolidation and repression.

Second, media consolidation with growing authoritarianism, coupled with a desire to grow the economy based on the growth of the digital and entertainment sectors will create politico-economic tensions that media institutions and workers will feel most acutely. This will most likely lead to ever more media concentration under the direct control of the royal family, and make media that is nominally privately-owned increasingly beholden to political power. It remains to be seen whether the Khashoggi scandal will lead to decreased harassment of Saudi journalists and dissidents in the long term, but in the short term, international reactions have not had a tangible, positive impact on the rulers' behavior.

Third, the advent of globally networked digital media will continue to pose a challenge to royal family control. The rise of global streaming platforms, such as *Netflix*, and the wide popularity of social media platforms, such as *Twitter*, in the kingdom will continue to challenge official Saudi narratives. The Saudi government has tremendous economic tools to stave off these challenges, and it could invest in these platforms so as to be able to influence their policies, but the negative turn that Saudi economic growth took in 2019 may ultimately limit their capacity

to counter information they cannot control. Social media also have the potential to fuel culture wars between conservatives and liberals, and to increase political polarization in the kingdom.

Outlook

As a result of the dynamics discussed above, the prospects for qualitative progress in Saudi Arabian media are dim, and the likelihood that the autonomy of Saudi media institutions will increase is low for the short to medium term. The Saudi media, paralyzed by direct government control, are heading towards more of the same in the foreseeable future. In their struggle for a different political system, and whether pushing for a more liberal or a more Islamist government, dissidents are likely to take advantage of emerging digital platforms that can be accessed inside and outside of Saudi Arabia. Despite this, the rise of digitization has not shaken the foundations of the system, since it has never been an entirely market-based system to begin with, but rather a system with strong dependency on princes, and in recent years, princes close to Crown Prince Mohammed bin Salman.

The new policy has focused on expanding entertainment venues, from cinema theaters to concert halls. For a while this may placate youths and liberals, many of whom have thrown their lot in with the Crown Prince, whom they see as a potent counterweight to conservative forces. However, it is too early to conclude whether this model combining political authoritarianism, social freedom, and economic concentration will move the country towards developing a more inclusive polity. The situation that Saudi media outlets find themselves in appears to offer limited opportunities for change outside of the space created and controlled by the rulers.

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