

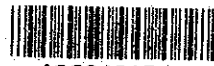
ARAB REPUBLIC OF EGYPT
STUDY REPORT
ON
THE NEW TV CENTER
AT
6TH OCTOBER CITY

JUNE, 1988

JAPAN INTERNATIONAL COOPERATION AGENCY

ARAB REPUBLIC OF EGYPT
STUDY REPORT
ON
THE NEW TV CENTER
AT
6TH OCTOBER CITY

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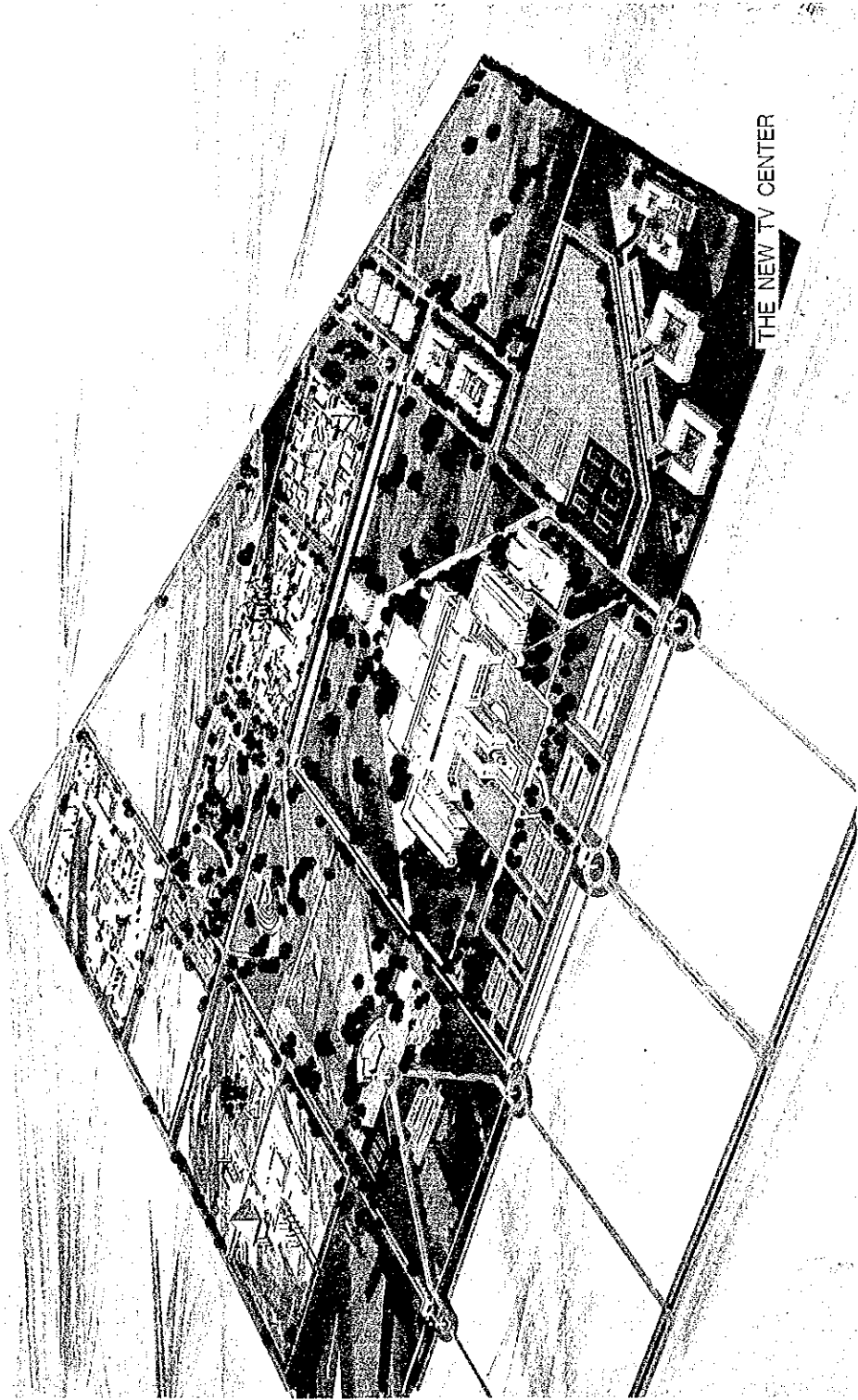


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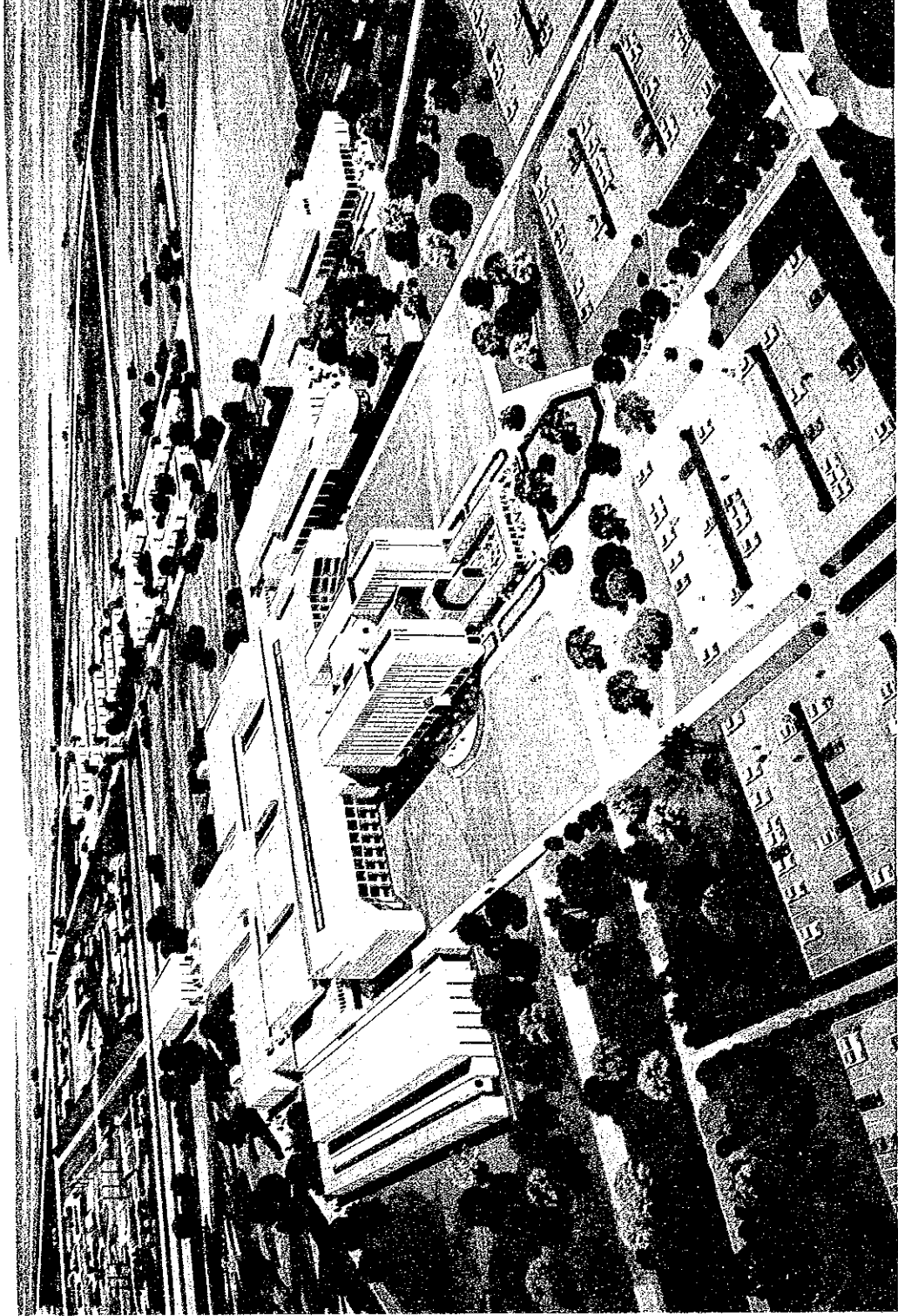
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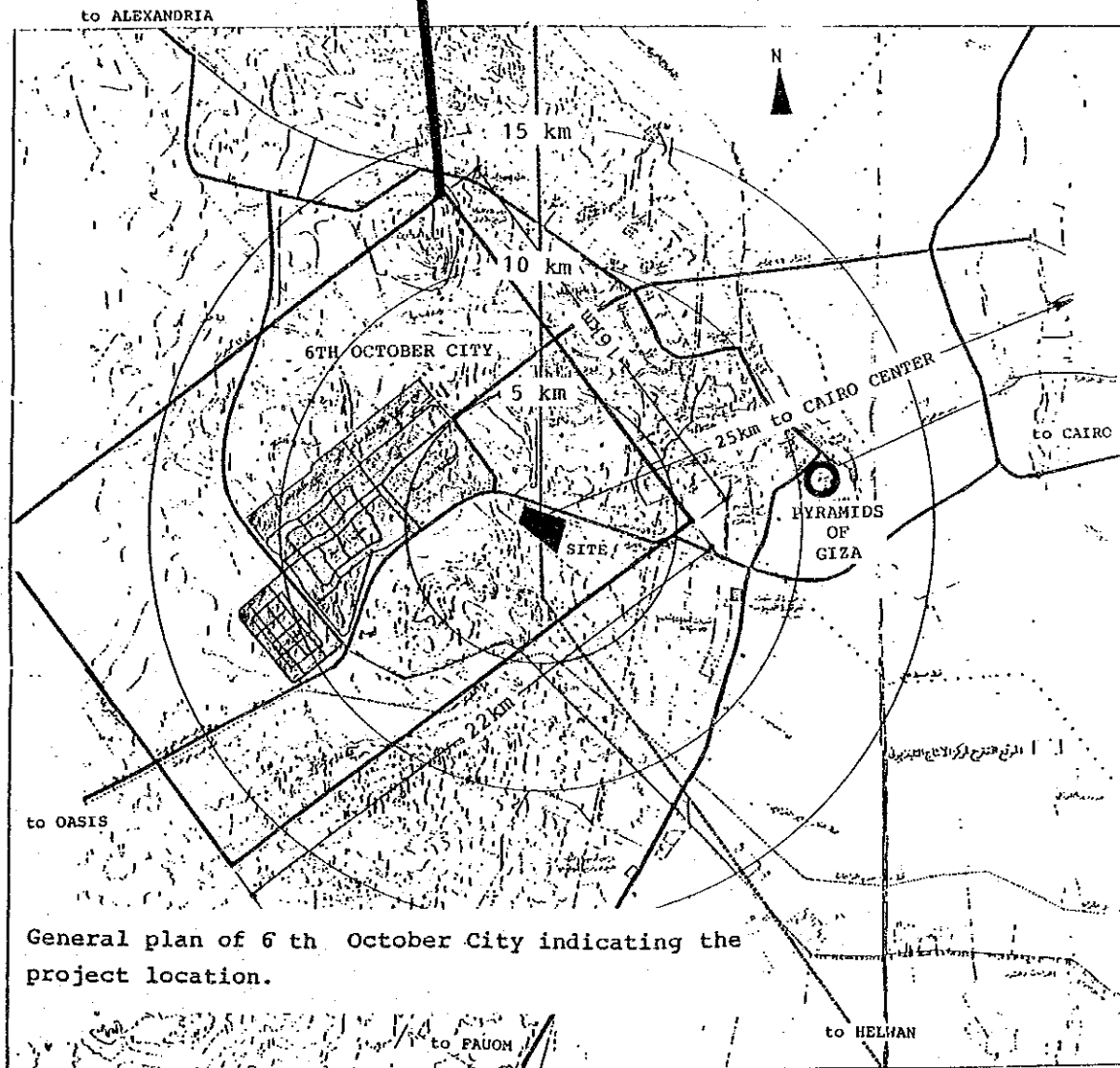
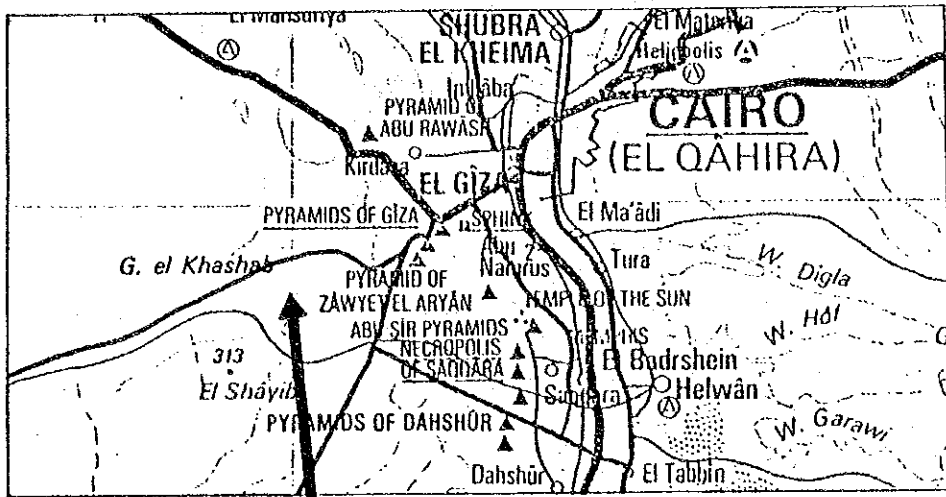
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Conceptional Bird's-eye View of the Site



Conceptual Bird's-eye View of the New TV Center



General plan of 6th October City indicating the project location.

PREFACE

PREFACE

In response to the request of the Government of the Arab Republic of Egypt, the Government of Japan decided to conduct a study on the New Television Center at the 6th October City and entrusted the study to the Japan International Cooperation Agency (JICA).

The JICA sent to Egypt a study team headed by Mr. Hiroshi Tsukada, Radio Station Inspector, Land Communication Division, Radio Department, Telecommunications Bureau, Ministry of Posts and Telecommunications, from September 3rd to November 1st, 1985.

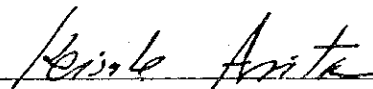
The study team exchanged views on the project with the officials concerned of the Egyptian Government and conducted a series of field surveys.

After the team returned to Japan, further studies were made and the present report has been prepared.

I hope that the report will serve for the improvement of TV broadcasting in Egypt and contribute to the promotion of friendly relations between our two countries.

I wish to express my deep appreciation to the officials concerned of the Egyptian Government for their close cooperation extended to the team.

June, 1986



Keisuke Arita
President

Japan International
Cooperation Agency

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APPENDIX

APPENDIX

SUMMARY OF THE PLAN FOR
THE NEW TV CENTER
AT 6TH OCT. CITY IN EGYPT

SUMMARY OF THE PLAN FOR THE NEW TELEVISION CENTER AT
6TH OCT. CITY IN EGYPT

1. Egyptians and Television

According to the survey conducted in 1984, the number of television (receiving) sets used throughout Egypt is about 4,300,000, and the number of people watching each television averages 6.4. The total number of viewers thus amounts to as many as 27 million, which accounts for 60% of the entire Egyptian population, totaled 45 million.

The spread of television, which was at first limited to the urban areas, now covers not only the large city areas but also 80% of the farming areas including Sinai Peninsula.

For the Egyptian people, television is the center of their happy family gathering, and an important medium which joins them with the outside world (the society, the nation and the world.) Television has thus become indispensable in Egypt to raise the level of the people's education and culture. According to the result of the field survey of the popularity rating of television programs (conducted in 1982 by the Middle East Advisory Group), 93.7% of those who have their own television sets watch programs for an average of three hours 49 minutes daily. The figure accounts for 56.2% of the total Egyptian population.

This popularity rating of television programs in Egypt -- 50 ~ 60% -- is indeed very high compared to that in America and Japan.

Shown below are the three main reasons for this extremely high popularity rating:

1. The Egyptians have only two channels to choose when they watch television programs. (Incidentally ERTU is the only television broadcaster, and there is no other broadcasters in Egypt.)
2. Other information obtaining sources (such as publications) and sources of entertainment are scarce.
3. The Egyptians (or rather the Arabs in general) are very fond of dramas.

2. Present State of Television Program Production at ERTU and the Necessity of the Project

2-1 History and the Present State of TV Production at ERTU

Television broadcasting in Egypt began in July, 1960. Since television in those days was all in black and white and there was, of course, no VTR yet, broadcasting had to be conducted on "live." With the introduction of VTR some time later, however, the production technique of television programs gradually changed to the technique of recording cut by cut by video tape just as in the production of films.

As a result, recorded video programs, instead of movie films, began to be exported to the neighbouring countries, and this naturally increased the time the television studios had to be occupied, resulting thereafter to the perpetual lack of studios at ERTU.

To make the matter worse, after the introduction of color television in 1974, programs have had to be produced at the Cairo Television Center, whose studio layout was made in accordance with the old technique adopted during the initial period of the black-and-white television programs (depending on "live"

broadcasting.) Because of the very limited space for assembling and storing the scenery sets and also because of the poor access of their storage area to the studio floors, efficiency of the program production has been extremely low.

The Five-Year (1982 - 1987) National Development Plan in Egypt, on the other hand, specifies the spiritual, ethical and social education of the Egyptian people, and the positive promotion of environment so as to make it appropriate for the materialization of the goal of national development. The Five-Year Plan emphasizes, among other things, the importance of the role of television for the promotion of popular education; and in order to make the most effective use of its functions, the Plan decides to build a new modern television production center and strengthen the production of high-quality educational and cultural programs by use of the latest television techniques and equipment.

Further, in response to the steadily diversified demand of the viewers, new Channel 3 was opened in the Cairo district on October 6, 1985 (to celebrate Egypt's Victory Day), and it is scheduled to expand gradually thereafter to the main local areas according to the annual plan.

As for the present state of ERTU's program production, popular educational and cultural programs, including dramas, are being produced at eight of the 12 large and medium-size studios of the Television Center Building in Cairo, excluding the three continuity studios and one news studio. What can be pointed out in general is that the inefficiency of drama production at large studios is affecting the production of general programs at the remaining medium-size studios, to deteriorate the production conditions there.

Under such circumstances, ERTU is still in the position to respond to the strong national demand for increasing the number of programs.

2-2 Necessity to Produce 2,100 Hours of New Programs

First of all, while ERTU's set on-the-air framework for general educational and cultural programs is 3,225 hours/year, the time actually produced for the programs at present is 1,100 hours, which is only 1/3 of the prescribed time. This means that the same programs are frequently rebroadcast which causes a great dissatisfaction of the viewers. When an appropriate amount of rebroadcasting ratio is taken into consideration, the fact remains that 575 hours of general educational and cultural programs are already lacking even at present.

Furthermore, it is simply impossible to educate the uneducated people, whose number exceeds 70% of the entire population, solely with direct educational and cultural programs. The more effective method to be adopted for their education is to try to increase their knowledge of industry and society and to strengthen their ethical sense through drama. In other words, it must be understood that programs in the form of drama should necessarily be used in broadcasting in order to achieve success in popular education in Egypt.

The next thing to be considered is the reduction of the number of imported foreign films and their replacement with the programs produced by ERTU. At present ERTU is depending heavily on other countries by importing 1,278 hours of foreign films, 347 hours of variety shows, and 663 hours of children's programs, which totals 2,286 hours, or 25% of the entire broadcasting time. The foreign currency to purchase these foreign films reaches 2.3 MLE/year.

Since the yearly supply of foreign films is short of demand, the rerun of the same programs is the order of the day, this also induces a great dissatisfaction of the viewers. Since many parts of the foreign films do not go well with Islamic customs and precepts, as far as contents are concerned, these parts must be cut before the programs go on the air. Using foreign films despite such inconveniences is because the number of ERTU produced programs is now far short of the people's demand for dramas.

ERTU is, therefore, anxious to produce dramas whose contents fit the Islamic tradition and society, and to replace 500 hours of altogether 2,286 hours of imported foreign films with the own made Egyptian programs.

The Egyptians' ability to create dramas has been cultivated by their long, cultural history and tradition, and they are far more richly talented in this respect than other Arabic nations. They also have the advantage of speaking the "standard" Arabic. In fact, the programs produced in Egypt are eagerly sought after by those Arab nations. As many as 5,300 hours/year of ERTU programs are at present exported to other countries (mainly Arabic), collecting as much as 10 MLE of foreign currency per year (1984/1985.)

Another thing to be considered about the dramas produced by ERTU is that strong dissatisfaction is expressed about the rebroadcasting of the evening home dramas on the same channel -- channel 1. There is an urgent need, therefore, to produce and broadcast sound home dramas to replace the present reruns. (20 minutes x 6 (days)/(week) x 50 (weeks) = 100 hours)

The school education programs broadcast in Egypt are so closely linked with the school education system that they have become indispensable. In the school

education system in Egypt -- 6 years of primary school, 3 years of preparatory school, 3 years of general secondary school, and 4 years of university -- the students have to pass the uniform national certificate examination before they go on to study at a higher-level school. At present ERTU is broadcasting two hours of programs daily for the students staying at home who hope to enter a preparatory or a general secondary school, featuring the curriculums for the third year classes only. (500 hours a year)

The present state of broadcasting, however, is insufficient, and new programs must be produced to cover the curriculums for the second and the first year class students. When programs for the primary school pupils are also to be broadcast, at least to double the hours of present programs, or to increase them by 500 hours for the time being, is considered necessary. $30 \text{ minutes} \times 4 \text{ (curriculums)} \times 5 \text{ (days)/(week)} \times 50 \text{ (weeks)} = 500 \text{ hours.}$

Also urgent, in connection with school education programs, is to increase the programs for primary school teachers. Under the conventional school system, one could get a diploma for teaching at primary schools simply by graduating from a 5-year teacher's Institute after graduating from preparatory school. However, in 1984 the primary school and the preparatory school education were made compulsory, and all primary school teachers were newly required to complete the curriculums equal to university education. Plans are now being worked out to make all the primary school teachers in Egypt --35,000 -- study by watching television programs and challenge the certificate examination at the end. For this purpose 150 more hours of programs must be produced. $0.5 \text{ hours} \times 6 \text{ (days)/week} \times 50 \text{ (weeks)} = 150 \text{ hours.}$

Also strong is the demand for new children's programs. At present ERTU is broadcasting 845 hours of children's programs on Channels 1, 2 and 3. Most of them, however, are foreign films and they are broadcast with little modification. Strong voices for the production of programs more suitable for Egyptian children are being raised.

ERTU is anxious to produce regular studio programs meant for the five to six year old children to replace the present foreign film programs, as the preparation for these small children to enter primary school. For the time being, it is considered urgent to produce 125 hours of children's programs a year. $30 \text{ minutes} \times 5 \text{ (days)/(week)} \times 50 \text{ (weeks)} = 125 \text{ hours}$.

Also under consideration is the setting up of a system of teaching by television programs the illiterate adults all over the country (whose number exceeds 70% of the entire population) simple reading, writing and arithmetic and giving them a certificate when they have passed at the end the examination given by the Education Ministry. Fifty hours of programs are necessary every year for this purpose. $10 \text{ minutes} \times 6 \text{ (days)/(week)} \times 50 \text{ (weeks)} = 50 \text{ hours}$.

It is also demanded strongly to establish vocational education programs for the people in local areas and the young people who are unable to have training at vocational centers due to various restrictions.

$30 \text{ minutes (early in the morning)} \times 6 \text{ (days)/(week)} \times 50 \text{ (weeks)} = 150 \text{ hours}$.

Foreign language conversation programs are also important in Egypt, where many visitors come from foreign countries, and the income from tourist industry is regarded as an important source of national finance.

At the same time, the programs for the study of standard Arabic language must also be broadcast. 150 hours of such programs should be given each year. 30 minutes x 6 (days)/(week) x 50 (weeks) = 150 hours.

While raising the educational level of general public, broadcasting also provides the intellectuals and the leaders in various fields of society, who support the nation, with the latest information; and it is considered necessary to compile 225 hours of regular programs in the three major fields of culture, economics and science.

45 minutes x 3 (fields) x 2 (6 days/week) x 50 (weeks) = 225 hours.

In addition to these, ERTU regards it necessary to further increase the present broadcasting time by 10 hours a day, as well as to broadcast new programs on Channel 3, which has newly been opened. The total of 2,100 hours of the above-mentioned new programs are the minimum necessary broadcasting time for ERTU to answer the trust and demand of the nation, which ERTU has cultivated in the past, and to continue to satisfy the expectation of the neighbouring countries in the Arab world.

2-3 Restrictions at the Present Cairo Television Center and the Demand for the Project of building the New Television Center

In order to satisfy the 2,100 hours of new program production mentioned above, 13 new television studios are required to be built. However, neither the expansion nor the remodeling of the existing Cairo Television Center is possible because of the neighbouring structures surrounding this building.

Furthermore, the present building is already more than 25 years old, and its power sources and the function of its air conditioning facilities have become obsolete; and there is no capability for the new additional installations. Under such circumstances, ERTU has selected from among the five satellite cities surrounding Cairo, 6th Oct. City, which is most modern of them all, secured 2 million m² of land as the site for the New Television Center, and asked the Japanese Government to conduct a survey plan of the project.

Based on this request, the Japanese Government dispatched a pre-survey team organized by the Japan International Cooperation Agency (JICA) in February, 1985. As a result of the survey, decision was made to carry out a practical survey. A JICA survey team was then dispatched for a period of about two months from September 3 to November 1, 1985, and they negotiated with the Egyptian Government officials concerned, and carried out the survey necessary for the Project, including the site survey, data collection, etc. The present report is the draft final report of this survey.

3. Program Compilation and Production Plan

To realize the 2,100 hours of new program production at a stroke is difficult from the view points of the building construction and the staff recruiting and training which must be conducted step by step in a systematic way. Therefore the entire period of construction must be divided into two phases. Phase 1 includes particularly urgent programs as possible as the staff and the facilities can afford, and the rest to be started from Phase 2.

Newly produced programs during Phase 1 and Phase 2
and the broadcasting channel

	Phase 1	Phase 2	Total
Programs to replace foreign films (1ch 2ch)	175 hrs.	325 hrs.	500 hrs.
Morning serial programs (1ch)	100	-	100
School education programs (3ch)	250	250	500
Teachers' programs (3ch)	150	-	150
Children's programs (2ch)	* 125	-	125
Illiterate adult programs (1ch)	50	-	50
Vocational education programs (1ch)	* 150	-	150
Foreign language conversation programs (2ch)	* 150	-	150
Standard Arabic language programs (2ch)	-	* 150	150
Sophisticated cultural programs (3ch)	-	225	225
Total	1,150 hrs.	950 hrs.	2,100 hrs.

* Altogether 575 hours correspond to the lacking programs even at present.

Objectives of the Plan to Build the New Television Center

The project to build the New Television Center aims at achieving the following three goals by constructing the modern program production facilities and the rationally planned studio complexes:

- (1) To produce high-quality educational and cultural programs and to contribute to uplifting the people's culture and their living standard.
- (2) To develop and produce all kinds of better Egyptian programs so as to satisfy the demand of the nation, and also to distribute and sell these programs abroad to obtain foreign currency; and
- (3) To provide a place for the many talented Egyptians to give full play to their abilities.

4. Plan of the Program Production Facilities

For the 2,100 hours of new program production, the required production facilities are as follows.

- (1) TV studio equipment 13
 - 900 m² studio 1
 - 600 m² studios 3
 - 300 m² studios 7
- (2) Utility studio equipment (3 rooms)
for post-production of VTR taped program
- (3) VTR Center and Telecine Center Equipment
- (4) Master Control room equipment
- (5) Microwave link equipment
for program transmission to the Cairo TV Center and Mugattam transmitter site.
- (6) VTR multi-copy center equipment
mainly copy work for marketing programs

- (7) VTR editing equipment
adopting "PD off-line editing system" for an efficient VTR operation.
- (8) Audio dubbing room equipment (5 rooms)
for sound program making after VTR editing
- (9) EFP (Electronic Field Production) equipment
for effective out-door shooting instead of film location
- (10) TV sound recording studio equipment (3 rooms)
for recording back-ground music in compliance with already edited VTR programs
- (11) Continuity Studio equipment
for Back-up use at emergency case of the Cairo TV Center.

Incidentally, what is taken into consideration during the planning is the unification or standerdization of TV cameras, VTRs, Video and Audio mixing consoles and so forth used in this studio-complex as far as possible, so that easy and efficient daily operation and maintenance can be achieved.

5. Architectural Planning

As for the architectural design of the New TV complex, the large and medium-size studios, in which production frequent accesses of the production staff, performers together with the scenery settings are required, accordingly they are gathered in the central part of the building, and on both the sides the small studios are laidout. The layout also has been made in consideration of easy demarcated construction of Phase 1 (the central part) and Phase 2 (both sides of the building.)

JICA Team proposed several alternative building layout plans, and as the result of the examination, the E-1 plan was finally decided.

5-1 Scale and Composition of Facilities

The composition and required floor area of the proposed facilities are as follows;

	Phase 1	Phase 2	Total
Administration Block	6,200 m ²	400 m ²	6,600 m ²
Studio Block	12,700	11,400	24,100
Decor Block	28,200	4,900	33,100
Supervisory Center	5,400	1,100	6,500
PD office	2,100	2,100	4,200
Program production room	4,600	700	5,300
Actor's Room	9,900	1,000	10,900
Mechanical Room	4,100	-	4,100
Total	73,200 m ²	21,600 m ²	94,800 m ²

(excluding parking and visitors' corridor)

5-2 Architectural Design

(1) Floor planning

The characteristics of the floor planning are as follows;

1. Studio and studio control room are planned at same floor level.
2. Enough decor making space is secured to make decor in the studio complex.
3. Enough storage space is secured considering the decor maintenance.
4. Independent room system for administration rooms to cope with local custom.

5. Visitor's corridor is planned at 2nd floor to operate and maintain independently from other sections.
6. Symmetrical floor plan is adopted to make Islamic design easy.

(2) Structural design

Considering the boring data of the site and local construction method, following structural design were proposed.

1. Sub structure : Direct foundation
2. Super structure : Reinforced concrete rigid frame structure
3. Wall : Brick or Concrete block

(3) Electrical design

1. As countermeasure against voltage regulation, voltage adjustable type transformer (which is equipped with on-load top changer) is provided.
2. As power source for studio equipment, CVCF and UPS equipment are provided.
3. As countermeasure against city power, three (3) sets of 1250 kVA generator are provided.
4. In consideration of future load, allowance of 10 - 15% is included in main equipment capacity.

(4) Mechanical design

Centrifugal refrigerating machines shall be used for New TV Center, and closed-variable water supply system shall be provided as piping circuit system. Considering the actual condition of available equipment in Egypt, Stand-by equipment shall be provided to cooling source equipment.

(5) Plumbing and sanitary design

Booster pump shall be provided to supply portable water, and treated water of soil and waste drain shall be re-used as watering source.

Fire extinguishing system, such as sprinkler, fire hydrant and CO₂ system shall be provided to the room with the consideration of the room function and requirement.

5-3 Outline of Architectural Design

The outline of the total building floor area is as follows;

Floor	1st Phase	2nd Phase	Total
Under Ground	24,470m ²	770m ²	25,240m ²
Ground	38,680	17,180	55,860
1st floor	15,650	7,180	22,990
2nd floor	6,180	3,550	9,730
3rd floor	2,120	-	2,120
4th floor	2,120	-	2,120
Total	88,220	28,840	118,060

(118,000)

6. Implementation Plan of the Project

6-1 Organization and Personnel Plan

(refer to Table 6-1)

Although the New Television Center is an organization placed under the rule of ERTU, it will be administered financially independent of ERTU.

Its employees, numbering 2,039, work at the three essential divisions -- the Program Production Division (with a staff of 1,498, including the producers of various programs, and the groups of staff who support program production from the engineering side and the fine arts side), the Engineering Division (with a staff of 466 people including those working for the facilities planning, the operation of post production using centerized facilities and building maintenance), General Affairs Division (with a staff of 75 people working for the personnel affairs, the accounting, the sale of programs, etc.)

6-2 Staff Recruiting Plan and Personnel Training Plan

(refer to Table 6-3)

Half of the necessary personnel planned to be employed at the New Television Center are those transferred from the present Cairo Center, 1/4 are those who are engaged in program production at various productions outside ERTU together with foreign broadcasting organizations, and the remaining 1/4 are expected to be filled by new employees. Although it is comparatively easy in Egypt to employ people with sufficient academic abilities and talent, program production requires years of experience and the expert knowledge and skill in the specific fields of work. Since the New Television Center is operated by the latest program production technique, the employees must be given a carefully planned-out

ORGANIZATION CHART OF NEW TV CENTER

Table 6-1.

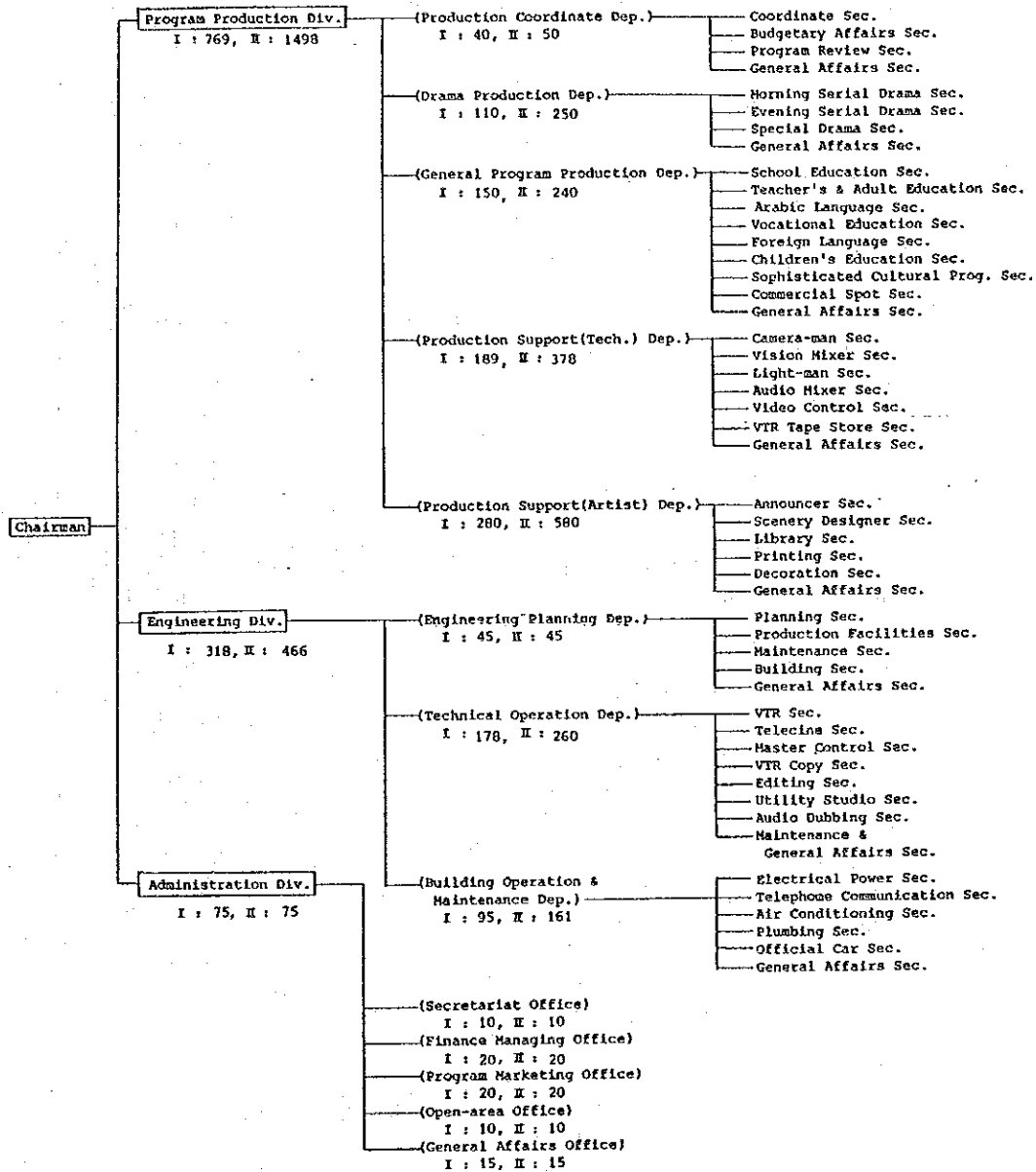


Table 6-3. PERSONNEL TRAINING PLAN

YEAR STAGE	1987									
	0	+1	+2	+3	+4	+5	+6	+7	+8	+9
<u>TRAINING IN FOREIGN COUNTRIES</u>										
Executive Course	1	1	1	1	1	1	1	1	1	1
Program Producers Course	2	2	2	2	2	2	2	2	2	2
TV Engineering Course	2	2	2	2	2	2	2	2	2	2
O & M Training at Factory Inspection										
TV Program Production Facilities				15						
Building Facilities				3						
<u>COLLECTIVE COURSE IN ERTU</u>										
General Course for New Employee										
Intensive Course for Program Producer										
Intensive Course for TV Engineer										
<u>ON THE JOB TRAINING IN NEW CENTER</u>										
PROGRAM PRODUCTION (including PD Tech. Art. Staff)										
BUILDING O & M										
<u>ASSISTANCE OF EXPERTS FROM ABROAD</u>										
TV PRODUCTION										
TV ENGINEERING										
BUILDING ENGINEERING										

training before they start working. The training, therefore, must be given by the following three stages:

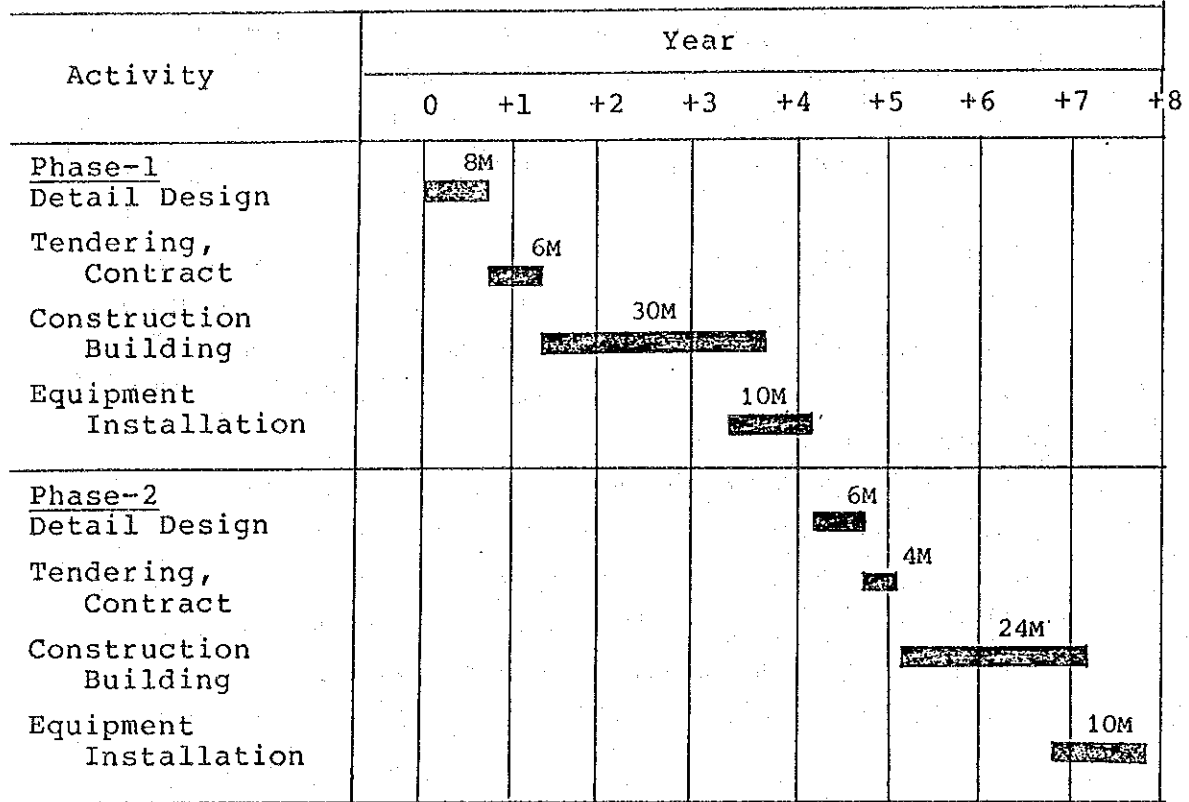
- (1) About three future leading producers and engineers each will be dispatched every year to participate in a group training (for 2 months) and a succeeding individual training also for 2 months given at some broadcasting training institutes in advanced countries.
- (2) These leading staff then give training, consisting mainly lectures, every year for 20 - 30 producers, engineers and new employees (for about one month) using the existing training facilities at Cairo Headquarter.
- (3) An on-the-job training is then given to all the staff, who have received the above training (2), actually using the facilities of the new center, during the period after the completion of the new center and the installment of studio facilities there until the official opening of the production.

6-3 Construction Schedule (Divided into Phase 1 and Phase 2)
(Refer to Table 6-5)

Several years will be spent for the construction of the building together with the employment of the staff and their training, so the entire period of construction must be divided into Phase 1 (4 years) and Phase 2 (4 years.). After the consultant is determined it will take 8 years.

Expected time schedule is as follows:

Table 6-5



▲ Consultant Contract

The implementation schedule proposed here consists of the following:

- Detail Design: The schedule covering detail design and tender documents preparation for phase 1 and 2 both for building and equipment.
- Tendering, Contract : The schedule covering prequalification, tender and negotiation stage.
- Construction : Construction covering the period from award of construction contract to completion of construction including installation of equipment.

6-4 Cost Estimate of Construction

Shown below are the expenses required for the construction of all the facilities and the supply of program production equipment -- altogether 36,500 million yen including the foreign and local currencies. The estimate was made severely from the international point of view, and at the same time, on the basis of mutual understanding between ERTU side and the JICA Team at the time of the Interim Report.

Outline of the Construction Cost of the New TV Center

B¥ -- Billion Yen
 unit: MUS\$ -- Million US\$
 MLE -- Million LE

(1US\$ = 200 Yen = 1.3LE, as of January, 1986)

	Architectural facilities	Program production	Production equipment	Total
Phase 1				
Foreign currency	9.8 B¥ (49.0)MUS\$	7.55 B¥ (37.75)MUS\$	17.35 B¥ (86.75)MUS\$	
Local	8.2 B¥ (53.3)MLE	0.05 B¥ (0.4)MLE	8.25 B¥ (53.7)MLE	
Phase 2				
Foreign currency	3.2 B¥ (16.0)MUS\$	5.45 B¥ (27.25)MUS\$	8.65 B¥ (43.25)MUS\$	
Local	2.2 B¥ (14.0)MLE	0.05 B¥ (0.31)MLE	2.25 B¥ (14.31)MLE	
Sum total				
Foreign currency	13 B¥ (65.0)MUS\$	13 B¥ (65.0)MUS\$	26 B¥ (130.0)MUS\$	
Local	10.4 B¥ (67.3)MLE	0.1 B¥ (0.71)MLE	10.5 B¥ (68.01)MLE	
Grand Total	23.4 B¥	13.1 B¥	36.5 B¥	

(The cost does not include the Hall and OB Van)

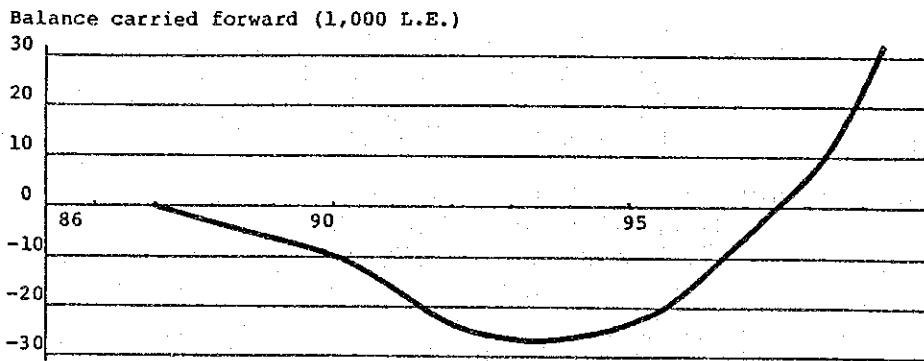
7. Financial Analysis and Social Appraisal

The initial investment requirement of this project is estimated to be 230.014 Million L.E., of which the foreign portion is 130 Million U.S. Dollars (71% of the total investment).

The financial analysis of the project is conducted according to the following procurement conditions of the initial fund:

- The local currency portion is covered by public investment of the Egyptian Government,
- The foreign currency portion is procured through long term soft loans (4% interest rate, 5 years grace period and repayment period of 20 years)

The results; the secular changes in the operating balance are shown in the Figure below.



The operating ratio exceeds 100% until the third year of the project's operation, showing a deficit in the accumulated balance. And about a 25.7 Million L.E. deficit is accumulated in the third year (1993). However, the balance improves thereafter and moves into the black in the eight year of operation (1998). After turning into the black, the operating ratio changes within a range between 50 to 60%, thus implying the soundness of operation as a public project.

The debt service ratio after the fifth year (1995) generally shows the sound condition of the balance. However, the repayment cannot be covered only by the project profit during the Phase I construction and the first four years of operation when the repayment of loan starts despite only the profit of Phase I operation is available. Therefore, the project will have to be subsidized by the Egyptian government.

The results of the analysis yield an internal rate of return of 7.72%. Given the 4% rate of interest on the project's loans, it may therefore be said that the project is indeed feasible.

The local currency portion of the initial investment is covered by the investment from the Egyptian government, therefore, if this portion is not counted as an investment for the New TV Center, the internal rate of return becomes 11.09%. Namely, the project can stand a loan interest rate of upto about 11%.

Moreover, this project not only yields financial benefit to the operating body but also produces such socio-economic impacts as educational benefit and improvement of social services, etc.

Therefore, from the standpoint of financial analysis and social appraisal, an earliest implementation of this project shall be recommended.

8. Recommendation on New TV Center's Administration, Organization and its Daily Operation

Stated so far is the outline of the background and the planning of the present project. In the part 8 of this report, various recommendations are given concerning the efficient and compact management and daily operation of the New Television Center, premised on the self-supporting financial system it adopts, in answer to the request made by ERTU.

As for the New TV Center's administration, it will be entirely different from the other existing Sectors in ERTU's Cairo Headquarter in terms of self financially supporting organization. The staff are on two kinds of salary basis, one is contract basis and the other is fixed basis.

In order to stabilize the operational management, the initial investment of the government, expansion of program marketing, stable supply of the high quality programs and the efficient operation of the Center will be indispensable.

A compact and efficient staff organization was proposed in order to execute the essential function of the Center. For the smooth and effective daily operation, transferring of right to the appropriate subordinates regarding the daily decision making of each head in the hierachic organization should be ordinarily conducted on the basis of clearly notified responsibilities and

rights to the related staff, so that the daily operational procedures must not be hazarded or delayed by lack of the decision making in each level.

This is especially essential for the payment procedures with regard to the program production. A simplified payment system with one line flow was also recommended.

To realize smooth and effective program production, JICA Team strongly suggested the following 3 points.

- (1) Well prepared production scenario
- (2) Complete notice of art-designer's intention
- (3) Fully understanding among program-producer and the production supporting staff prior to the production works.

Besides that, the introduction of "PD Off-Line Editing System", the intensive use of EFP equipment and importance of unification or standardization of the various production equipment are also recommended.

PART 1

INTRODUCTION

1. INTRODUCTION

1-1 Back-ground of the Project

ERTU, as the sole broadcasting organization in Egypt, is now servicing its Television broadcasting by its 1st and 2nd channel nationwide programs for total about 20 hours a day and in addition, recently started 3rd channel TV broadcasting which is aimed at local service, at first in Cairo district from 6th Oct. 1985. Number of viewers in Egypt has been steeply increased up to 27 million with 4.3 million TV receivers which covers more than 60% of the whole nation and still increasing year by year.

By this way, television has become very popular in Egypt, not only covering major cities but almost throughout the country, even in the rural areas having two percent of population and playing great important roles for the source of instructive social informations together with entertainments and amusements, so that ERTU TV programs are now indispensable for whole Egyptian's daily life and the social and national welfare.

Thus, while the demand for various TV programs especially own-made educational and cultural TV programs including traditional and instructive dramas has become very strong, existing TV program production facilities in ERTU Cairo Headquarter building are not capable to cope with such growing demand by its definite lack of the expansibility and effective operationability.

Therefore, in order to meet these demands and to realize an effective TV broadcasting, ERTU has made the

following expansion plans for TV broadcasting.

- (1) Expansion of TV transmitting network covering the whole country. (Regarding 1st and 2nd channel, this has been almost completed, and for 3rd channel, ERTU are continuously endeavoring to establish the new 3rd channel broadcasting at the regional center stations.)
- (2) Construction of new TV program production center to meet with nationwide growing demand for the more educational and cultural TV programs.

With regard to the said situation, the Government of Egypt requested the technical cooperation of the Japanese Government to conduct the study of the new TV Center at 6th October City, about 25 Km to the west of Cairo City.

1-2 Preliminary Study

In response to the request, the Japanese Government decided to dispatch a preliminary survey team of JICA, the implementing agency for the technical cooperation, to Egypt from 17th to 26th of February, 1985.

And both the Governments agreed to carry out the study on the New TV Center in close cooperation.

The Scope of Work for the study on the New TV Center at 6th October City was prepared and agreed between ERTU side with the signature of the President, Mr. Hussein Mohamed Enan and the leader of the preliminary JICA Study Team, Mr. Ichiro Shoji on 25th February, 1985.

(The document is shown in Appendix)

Participants of Preliminary Study Team are as follows;

E R T U

Mr. Farouk Ibrahim Ali : Chairman of Broadcast
Engineering Sector

Mr. Mahmoud Khattab : Cheif Director of Studio
Projects

Mr. Sami Mohamed Badawi : General Director for
Architect Design

Mr. Abdel Fattah Tohami : General Director for
Film and Recording
Project, and the
Executive Manager of
the Project

JICA Team

Mr. Ichiro Shoji : Leader

Mr. Hiroji Minoura : Member

Mr. Masayuki Hirata : Member

Mr. Haruo Kurakata : Member

Mr. Ryota Ono : Member

1-3 Objectives of the Study

The objective of the Study is to draw up a plan of a new TV program production center which shall promote educational and cultural programs and contribute to development of living standard throughout the country.

The plan consists of the following items;

(1) To formulate a plan of a new TV program production

center which shall be constructed in the 6th October City including basic design and preparation of an implementation schedule.

- (2) To recommend its effective operation and management system.

1-4 Outline of the Study

1-4-1 Study area

The 6th October City

1-4-2. Contents of the Study

a. Data collection, Analysis and Field Survey

The team shall carry out data collection, analysis and field survey on the following items;

- (1) Socio-economy
- (2) Present condition of TV broadcasting
- (3) Present program production plan and system
- (4) Present condition and program production system of educational and cultural TV program
- (5) Financial condition of ERTU
- (6) Existing TV program production facilities
- (7) Topographic condition and infrastructure in the construction site
- (8) Construction method and material

b. Planning, Designing and Recommendation

Based on the results of above studies, the following items shall be undertaken by the Team.

- (1) Review of the existing conceptual TV Broadcasting plan
- (2) Formulation of an educational and cultural program production plan
- (3) Basic design of the new TV program production center

- (4) Cost estimate of construction and operation
- (5) Preparation of an implementation schedule
- (6) Recommendation of an effective operation and management system of the new TV center
- (7) Financial analysis and social appraisal of the project

1-5 Members of the Study Team

1-5-1 Grouping of the Study Team

In order to proceed the study effectively, the Study Team was divided into next five groups.

- * Group G (Management group)
 - Present status of ERTU
 - Recommendation on administrative affairs
 - Personnel Planning
- * Group A (Program group)
 - Compilation of broadcasting programs
 - Planning of production and resource allocation
 - Marketing of programs
- * Group B (Production facilities group)
 - Planning of production facilities
- * Group C (Architecture group)
 - Planning of the building
 - Lay out of the whole site
- * Group D (Finance & economy group)
 - Financial analysis & social appraisal

1-5-2 JICA Team's Member

Leader

Hiroshi TSUKADA
Ministry of Posts and Telecommunications

Sub Leader, Personnel Planning

Toshinori MIURA
All Japan Radio & Television Engineering Services
Co., Ltd. (A.J.T.S.)

Coordinator

Kazuo ICHIHARA
Japan International Cooperation Agency (JICA)

Group G.

Hisanari NISHIUCHI (Administration Planning)
Japan Broadcasting Corporation (NHK)
Shigeya OHTA (Organization & Operation Planning)
Japan Broadcasting Corporation (NHK)

Group A.

Hajime NIWA (Program Planning) A.J.T.S.

Group B.

Hajime SUGA (Studio Facilities Planning) A.J.T.S.

Group C.

Shotaro HAYASHIYA (Leader of Architectural
Planning)

Yamashita Architects & Engineers Inc.
(YAMASHITA)

Bunichiro NOGUCHI (System Layout Planning)
A.J.T.S.

Takanori TANAKA (Architectural Planning)
YAMASHITA

Minoru TANAKA (Structural Planning)
YAMASHITA

Seishi ASAKURA (Electrical Facilities Planning)
YAMASHITA

Tsukasa TAMAKI (Mechanical Facilities Planning)
YAMASHITA

Takanori MOGAMI (Building Cost Planning)
YAMASHITA

Group D

Junkichi YAMAZAKI (Financial Analysis)
A.J.T.S.

1-5-3 ERTU's Study Member

- Mr. Mahmoud Khattab : Leader of the ERTU Study Team
Chief Director of Studio
Projects
- Mr. Abdel Fattah Tohami: Concerned with G.B.C. Group
General Director of Recording
and Firm Projects
- Mr. Said Fayoumi : Concerned with B Group
Director of Recording Projects
- Mr. Nabeel Sabri : Concerned with C Group
General Director of Structural
Design
- Mr. Sami Badawi : Concerned with C Group
General Director of
Architectural Design
- Mr. Nabeel Mobasher : Concerned with D Group
General Director of Costing,
Financial Affairs Sector
- Mr. Yousef Osman : Concerned with A Group
Chief Director of Video
Production,
TV Setor
- Mr. Fathy Nassar : Concerned with D Group
General Director of Purchase
and Contracts

Mr. Nagy Barkoky : Concerned with D Group
 Director of Foreign Contracts
 and International Cooperation

Mr. Ali Elghalid : Cordinator of the ERTU Study
 Team
 Director of B.C. Engineering,
 General Relations

ERTU Officials acted as reference in the TV Survey

Mr. Abdel Salam Khalil: Concerned with A Group
 Deputy Chairman of TV Sector

Mrs. Madiha Kamal : Concerned with A Group
 Head of Channel 2

Mrs. Nadia Hassan : Concerned with A Group
 General Director of School
 Education Programs

Mrs. Laila Salah : Concerned with A Group
 Director of Education Programs

Mr. Salah Samhan : Concerned with A Group
 General Director, Adult
 Education

Mrs. Sawsan Osman : Concerned with A, B Groups
 General Director for O.M. TV
 Program Studio

Mrs. Nagwa Shaalan : Concerned with A Group
 General Director for O.M. Drama
 Studios

Mrs. Nagwa Abdallah : Concerned with B Group
 Director for O.M. Video Tape

Mr. Abdel Hady Mekky : Concerned with A, C Groups
 Director Scenary Design

Mrs. Netokrise Kamel Gouda: Concerned with A, C Groups
 Director Painting Graphic

Mr. L. Alami : Concerned with A Group
Chief Producer Drama

Mr. Wahid Mostafa : Concerned with C Group
Director of Electrical Project

Mr. Hassan El-Shiekh : Concerned with C Group
General Manager of Power
Maintenance

Mr. Adel Farghaly : Concerned with C Group
Power Maintenance Engineer

Miss Magda Rafla : Concerned with C Group
Architect Engineer

ERTU Officials offered national and ERTU statistical
information

Mr. Kamal Sakr : Concerned with A Group
Chairman of ERTU General
Secretariat

Mr. Kamal Osman : Concerned with A Group
General Director of Press
Affairs
ERTU General Secretariat

1-6 JICA Team's Itinerary of the Survey and Study in Egypt
(3rd Sep. to 1st Nov. 1985)

The Survey for collecting data necessary and the Study in close cooperation between Egyptian Counterparts and the JICA Team were carried out from September to October, and the Progress Report was submitted and explained to ERTU at the end of October, 1985 as shown below.

SEP

<div style="border: 1px solid black; padding: 5px; display: inline-block;"> Messrs. Tsukada Nishiuchi Ohta Ichihara Miura Niwa Suga Noguchi Hayashiya T.Tanaka </div>	→	LV.Tokyo	3 Tue	-	Departure Tokyo	
		↓	VIA JL481			
		→	AV.Cairo	4 Wed	-	Arrival Cairo, Egypt Courtesy call on Japanese Embassy and JICA Office
				5 Thu	-	Visit ERTU, Submitt- ing Inception Report Courtesy call on authorities concerned of Egypt
				6 Fri	-	Team meeting
				7 Sat	-	Team Meeting
				8 Sun	-	Explanation of Incep- tion Report and General meeting
				9 Mon	-	On the spot survey Cairo Broad-casting Center (TV Broadcasting and Program Productions).
				10 Tue	-	General meeting with ERTU Team
				11 Wed	-	Signing of Minutes of Discussion Courtesy call to Ministry of Economy and Development (Mr. H.Tsukada, Mr. Miura, Mr. K.Ichihara)

- 12 Thu - Site survey in 6th October City (Leader and Coordinator)
- 13 Fri - Team meeting
- 14 Sat - Team meeting
- 15 Sun - General meeting: Nominating counterparts for each study group (ERTU side)
- 16 Mon - Team meeting
- 17 Tue - Courtesy call to Mr. Ehnán, President of ERTU. Group discussion
- 18 Wed - Arrival at Cairo (Mr. J. Yamazaki: D Group) General meeting: Outline of building & facilities
- 19 Thu - General meeting: Confirmation of the discussing points
- 20 Fri - Team meeting
- 21 Sat - Team meeting
- 22 Sun - Group discussion
- 23 Mon - General meeting: Producing condition of drama program, necessary number of drama studio
- 24 Tue - General meeting: Prospects of film production Group discussion
- 25 Wed - General meeting: Future program plan (New IV Center) (Opening of new meeting room in ERTU)
- Messrs. Tsukada Ichihara ← AV. Tokyo
- LV. Cairo ← VIA AF480 JL424
- Mr. Yamazaki → LV. Tokyo
- ↓ VIA JL481
- AV. Cairo →

- 26 Thu - Group discussion
- 27 Fri - Team meeting
- 28 Sat - Team meeting
- 29 Sun - General meeting:
Summing up of Group
- 30 Mon - Group discussion

OCT

Messrs.
Nishiuchi
Ohta
Noguchi

LV.Cairo ←
↓ VIA MS
← AV.Tokyo

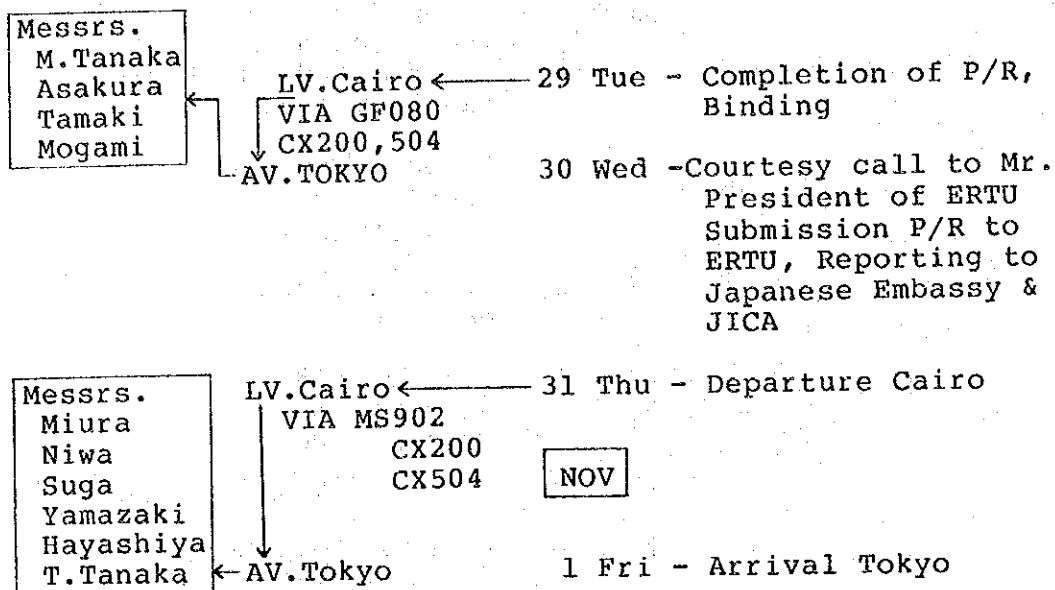
- 1 Tue - Group discussion
- 2 Wed - Group discussion
- 3 Thu - Group discussion
- 4 Fri - Team meeting
- 5 Sat - Team meeting
- 6 Sun - Team meeting
- 7 Mon - Group discussion

Messrs.
M.Tanaka
Asakura
Tamaki
Mogami

→ LV.Tokyo
↓ VIA JL481
AV.Cairo →

- 8 Tue - Group discussion
- 9 Wed - ERTU side executive
meeting
(President, Mr.
Ehnan)
- 10 Thu - General meeting:
Contents of
yesterday's ERTU
meeting
- 11 Fri - Team meeting
- 12 Sat - Team meeting
- 13 Sun - Group discussion:
Demarcation of Phase
I and Phase II
- 14 Mon - General meeting:
Program production
cost, estimate of
personnel, construc-
tions cost

- 15 Tue - Group discussion
Team meeting: Result
of the study so far
and key point
- 16 Wed - Group discussion:
Problem points of
each group
- 17 Thu - Group discussion:
continue
- 18 Fri - Team meeting:
Preparation of
Progress Report
- 19 Sat - ditto
- 20 Sun - General meeting:
Building plan,
organization of New
TV Center
- 21 Mon - Preparing the
Progress Report
- 22 Tue - General meeting:
Building plan,
organization of New
TV Center
- 23 Wed - Group discussion:
Contents of Progress
Report
- 24 Thu - Preparing of Progress
Report
- 25 Fri - Team meeting, Prepar-
ing Progress Report
- 27 Sun - General meeting:
Contents of P/R
- 28 Mon - ditto

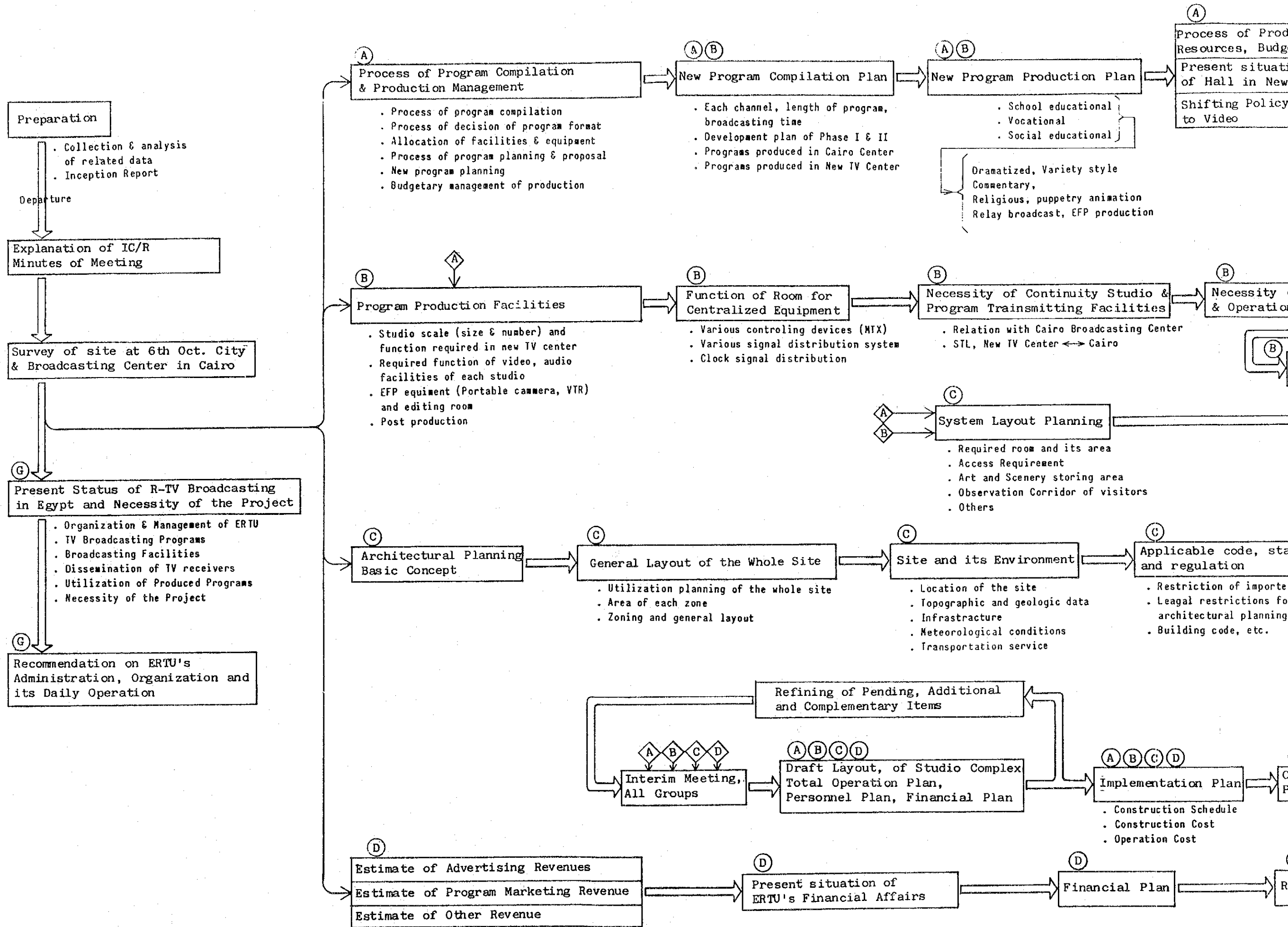


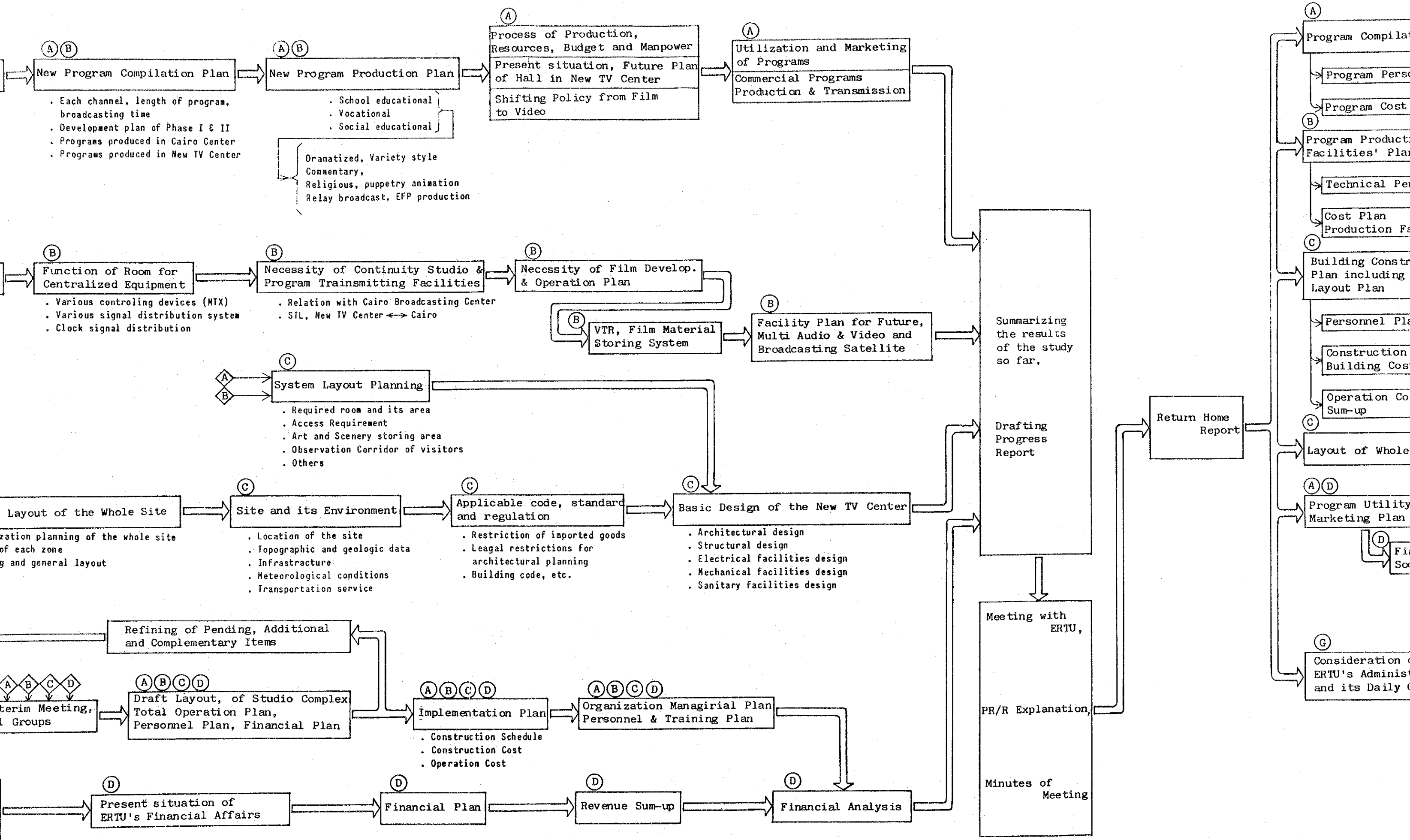
1-7 Methodology of the Survey and Study

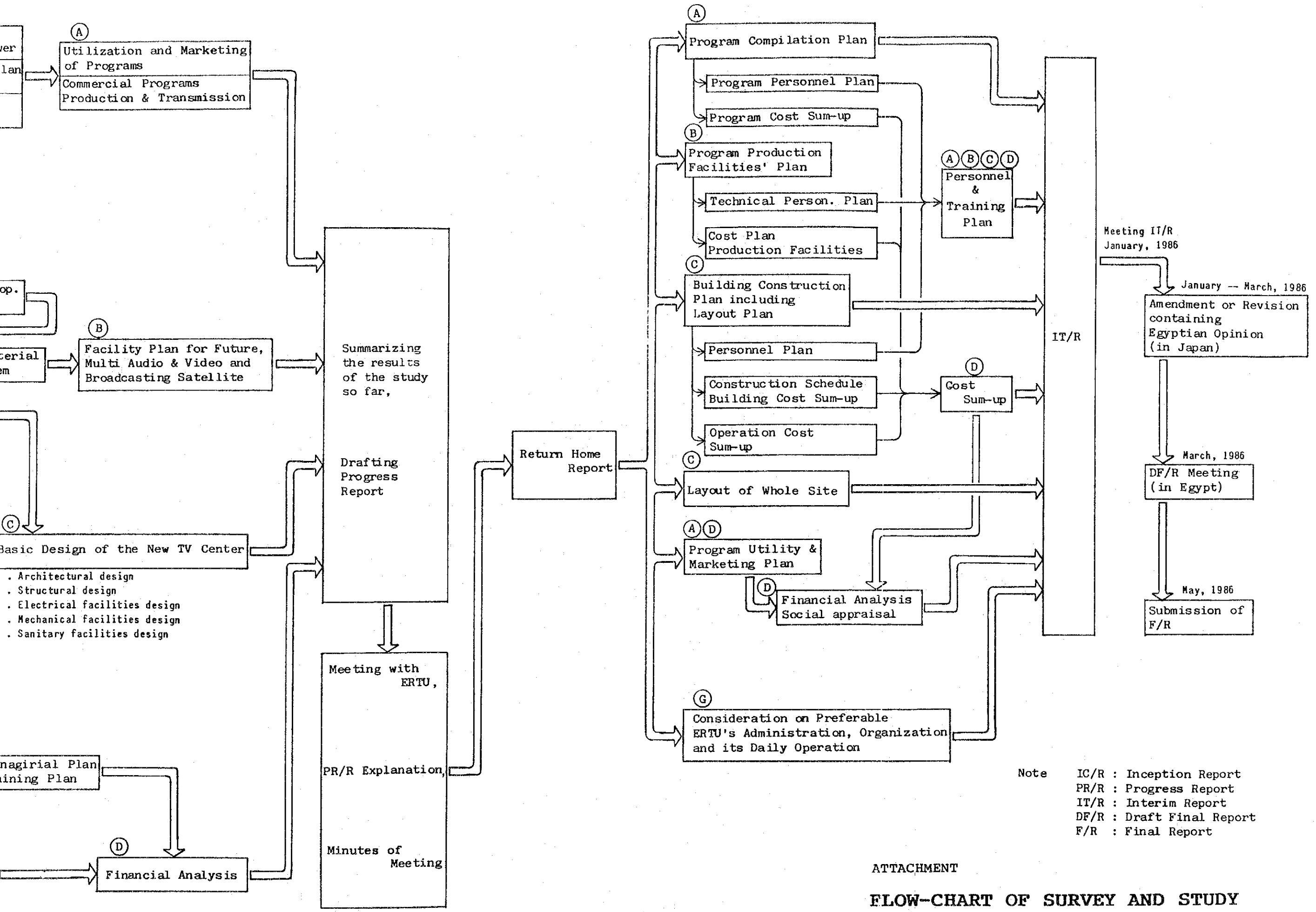
The flow-chart of the survey and study starting from the Inception Report to the submission of the Final Report is shown in the attached "Flow-Chart of Survey and Study".

1-8 ERTU Counterparts' Cooperation with the JICA Team's Study during the preparation of the Interim Report in Japan

The cooperation of three (Mr. M. Khattab, Mr. A.F. Tohami, Mr. N. Mobasher) ERTU's Counterparts with the JICA Team's study was very effective especially to decide the alternative building layout plans and to make more detail and practical deliveration on the planning of the Project.







Note
 IC/R : Inception Report
 PR/R : Progress Report
 IT/R : Interim Report
 DF/R : Draft Final Report
 F/R : Final Report

ATTACHMENT
 FLOW-CHART OF SURVEY AND STUDY
 1-15

PART 2

PRESENT STATUS OF
TV BROADCASTING IN EGYPT
AND NECESSITY OF THE PROJECT

2. PRESENT STATUS OF TV BROADCASTING IN EGYPT AND NECESSITY OF THE PROJECT

2-1 The Egyptians and Television

(1) Popularization of Television Sets

In 1969 the Egyptian government announced the number of television receivers actually in use in Egypt at that time as 498,000 (according to the Arab State Broadcasting Union 1969.) According to the yearbook published in 1983/1984, however, the number has risen to 4,300,000, which was based on the result of the statistical field survey conducted by the Middle East Advisory Group (MEAG) which ERTU entrusted in the previous year. The color televisions account for 13.6 % of the total number of television sets; the average number of viewers per set is 6.4, the total number of viewers thus amounting to 27,000,000.

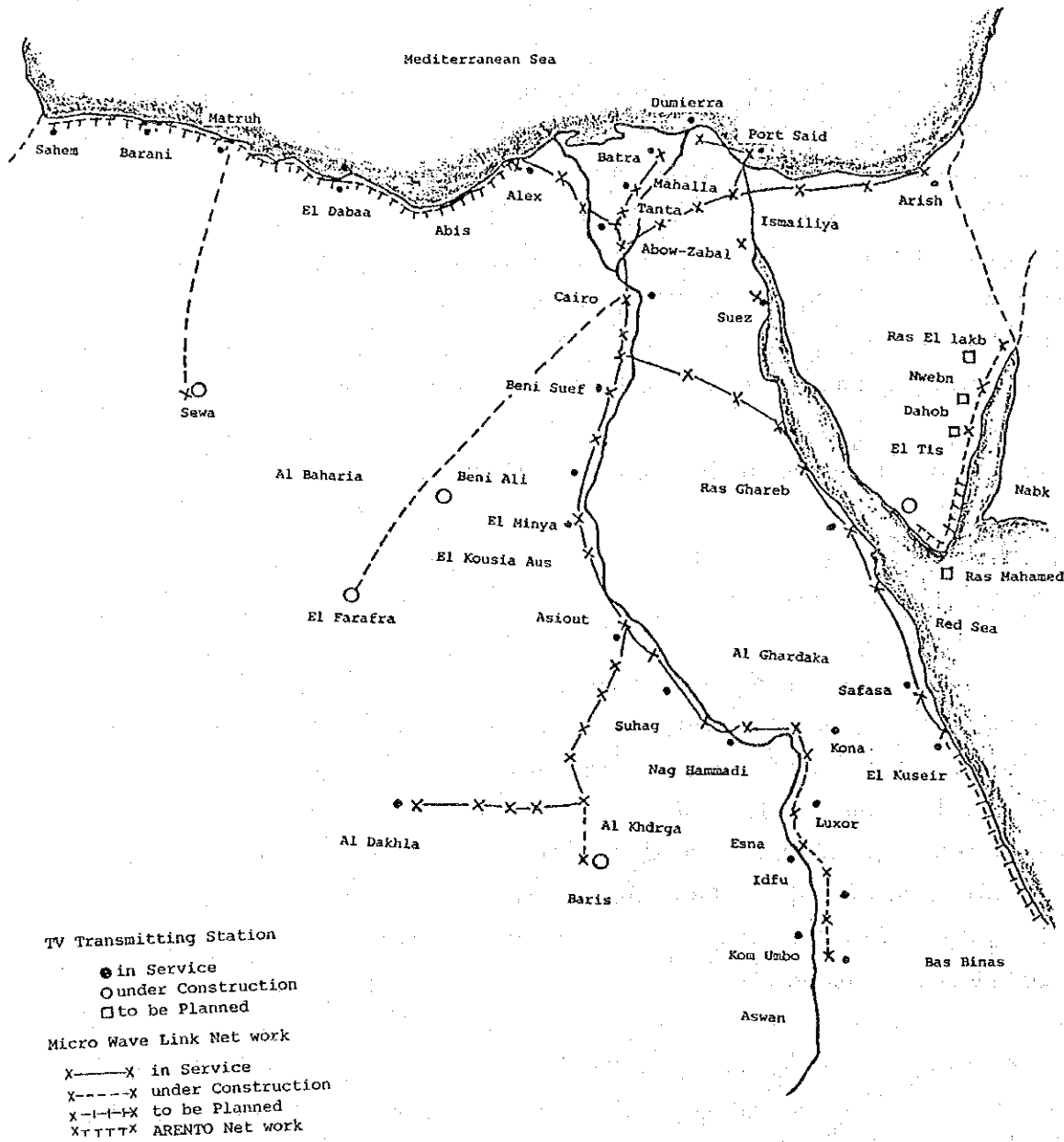
The figure represents 60 % of the total population of Egypt (45 million.)

The dissemination of television, which was limited at first to urban areas, has rapidly expanded in recent years; and the nationwide networks of Channel 1 and Channel 2 have also been extended, thanks to the efforts exerted by ERTU. Today the networks cover not only urban areas but also 80 % of the farming districts. (Figure 2-1 shows the actual state of nationwide television networks)

For the Egyptians, television is the center of their happy family gatherings. It is not only a means of entertainment but also an important medium which connects them with the outside world (the society, the nation, the world, and even the space); and has become indispensable for improving the level of their education and culture.

PRESENT STATE OF TV BROADCASTING NET WORK IN EGYPT

Fig. 2-1



Cairo and Alexandria are two richly cultural cities with live music concert halls, theaters, cinemas, as well as facilities for all kinds of sports. Most of them, however, are connected with private clubs, and the majority of the Egyptians are not so financially privileged or have no high social status to be able to use these facilities. Even the wealthy people who are in search of amusement outside their homes find it physically difficult to visit these places because of the excess population of Cairo city.

The population of Cairo was 5,070,000 according to the 1976 national census, but it was estimated to have reached 8 million in 1980, and is said to have exceeded 10 million today (1985).

City streets there are so crowded that they seem to explode at any minute. The heart of the city is in terrible confusion with the automobiles which are trying to take every advantage to go ahead, and with the pedestrians who try to cross the congested roads. Worse still, because of the lack of proper parking lots, cars are parked along side the roads in rows, which is aggravating the already terrific congestion of the city.

The result is the majority of the citizens in Cairo confined to their homes just to watch television. On the other hand, due to the financial and various other reasons, women's advance into society is remarkable in Egypt and there are not small number of dual-income families. Traffic jam during the rush hours for students and commuters, therefore, far exceeds the imagination of the Japanese. Subway construction is now proceeding in Cairo city, its completion will certainly release the traffic jam to a considerable degree.

For the average Egyptians, the dream of owning their own private cars does not seem to come true in the near future.

The relationship between agricultural regions and television in Egypt started in early 1960's (the early age of television) when the government provided the farming villages and the cultural centers in urban areas with subsidies to place televisions for the public. These were effective, of course, but they eventually became old or damaged, and were left unused. In the meantime, as a result of the expansion of transmission networks, the number of villages located on both sides of the Nile, where television broadcasting could be received, increased; and the families living in these villages became more and more television-oriented. A common pattern of the increase in the ownership of televisions starts from the wealthy and influential villagers. As financial conditions improve, other families tend to have their own televisions. For those who are not rich enough to own televisions for themselves, coffee houses purchase the sets in their effort to expand their business, taking advantage of the popularity of television. Even the children who do not have televisions at their homes visit coffee houses to watch their favorite programs. An American who had been working as a volunteer near Beni Sueif town south of Cairo, setting up utility poles and equipping them with wire to supply the villagers with electricity, reported (Corcoran 1980) that some influential people and businessmen in the village had already purchased television sets before electricity actually reached their homes.

In a large city like Cairo, on the other hand, the problem lies not so much in the supply of power, but in the low income of the people. In many cases, family members share the expense for purchasing a television sets. In Bulag and Shubra in Cairo, crowded with small houses for low-income families, it is often the case that a couple in their forties and a younger couple cooperate to deposit money for several years in order to

buy a television. It is also customary for a woman to sell her hold ornaments, and the other members of the family cooperated with her to deposit money for the entire family.

When pressed with the choice whether they should buy a refrigerator or a television, many of the low-wage earners will buy a television first. (Rush 1980) Many people also buy second-hand televisions by monthly installments. There is a special area in Cairo between the Opera Square and Khan Khalili Market, where second-hand articles including old radios and antique radar sets are sold. There old parts are repaired and reassembled to be sold as second-hand television sets at the markets.

Among the low-wage earners, to own a television is the demonstration of their status symbol.

Incidentally the average annual income of the Egyptians is 100 - 200 LE (¥15,000 - 30,000), while the average price of a television is 400 LE (¥60,000).

Mr. Douglas A. Boyd writes in his book, "Broadcasting in the Arab World" (p.50 2.1 Egypt) as follows: "The reason why the Egyptians buy a television in spite of their financial difficulties seems to be that they believe it is absolutely necessary for the pleasure of the family and in order to make a living in a city, and also that television provides their children with something which widens their view of the society and gives them better education."

(2) How the Television Programs are being watched

Regarding the likings of the public for various television programs or the popularity rating of the programs, which has been noisily discussed in America

and Japan, however, the data is extremely scarce in Egypt. This is a common problem in all broadcasting organization in the Arab world and Egypt is no exception.

This is because the public is not cooperative with the opinion surveys conducted by various information media. As for ERTU, President Enan himself is attending meetings similar to those held by NHK in Japan, to talk with television viewers (ERTU Yearbook) in his effort to grasp the general tendency. But to obtain the quantitative figures, seems to be very difficult. Except for the statistical data concerning the commercial spots announced by the aforementioned MEAG, very few data are available.

This is because the Egyptians are traditionally reluctant to answer the questions asked by the so-called "authorities."

Listed below are some of these few data concerning how the Egyptians are viewing television programs. Since the figures are taken from the families who have their own televisions, these must be multiplied by 0.60 or 0.80 to find the actual percentage in the total population.

Although called the data for the commercial spots, they can rather be regarded as the data for popularity rating of the programs broadcast before and after the commercial spots than commercials themselves.

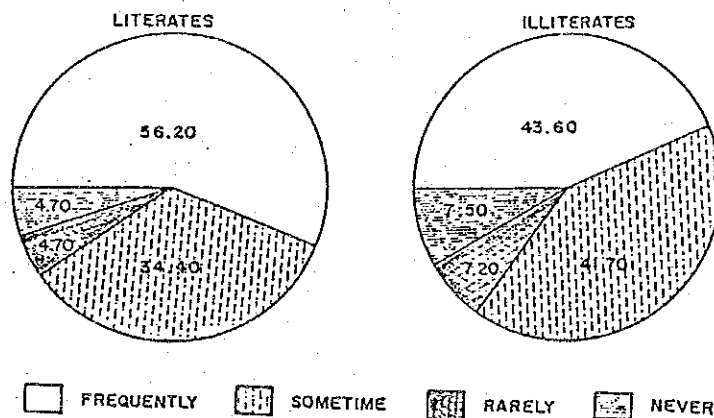
To compare between TV and print media, the following figures have to be considered

1. TV's total coverage 60 % (mentioned previously)
2. Coverage of the 3 morning newspapers published in Egypt 15 % as follows:
 - a) Total circulation: 2 million copies
 - b) Average readership per copy 3.4
 - c) Total readership: 7 million (out of 45)
3.
 - a) 30 second spot peak time costs on the two channels together US\$2,500.
 - b) 20cms two columns front page with one additional color in the 3 morning papers costs US\$5,000.
 - c) Therefore, cost of the TV commercial is half that of space in the 3 newspapers, instead of being 4 times as much, i.e. eight times cheaper.

TV appears to both the literate and the illiterate population

Egypt has still an illiteracy rate of over 50 %. This does not mean that illiterates necessarily have less purchasing power. In fact they include artisans like carpenters, electricians, mechanics etc... who may earn more than university professors and government officials.

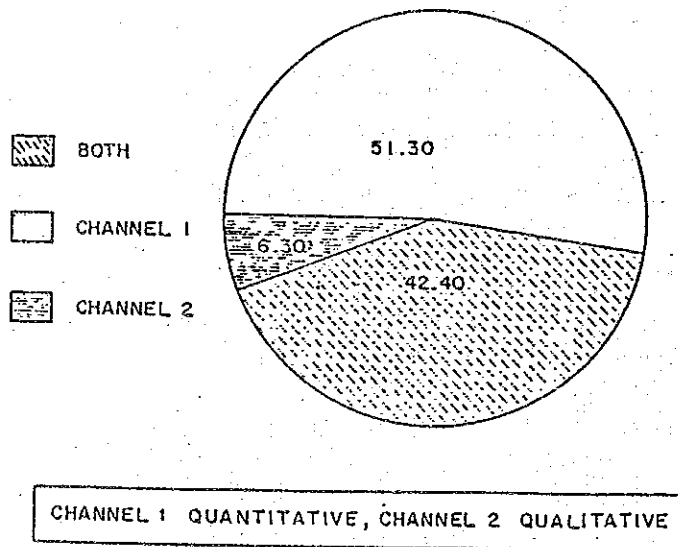
Distribution of the Sample Surveyed According to T.V. Commercials Viewing and Literacy



NOTE: According to the national census in 1967 of those older than 10 years of age, there were 15,100,000 totally illiterate people, and 5,530,000 people whose educational level is lower than that of primary school graduates. When these figures are divided by the total population of 26,900,000 in that year, they come up to 76.7 %, and the rate of totally illiterate to the total population is 56.1 %.

How the two Channels, each covering the whole country, being watched

- (1) After electrical power entered 80 % of Egyptian villages TV followed. Sets range in number now between 20 and 50 in each village.
- (2) 42.4 % of adults said they view the two Channels equally, whereas 51.3 % preferred channel 1 and 6.3 % channel 2.
- (3) Adult viewers of channel 1 have been found to be more in number, and channel 2 to be better in quality of viewers.
- (4) 96.5 % of adults said they view programs on channel 1, 48.9 % said they view on channel 2.
- (5) The first two programs preferred on the two channels alike are Arabic serials and Arabic films.



Popularity rate according to the day of the week, and the viewing time per day

- (1) The average TV viewing time per day: 3 hours and 49 minutes
- (2) The peak hour of TV viewing: 19:00 - 20:00
(popularity rate -- 75.5 %)
The second most popular time: 20:00 - 23:00
(popularity rate -- 74.2 %)
- (3) The highest popularity rate is made on Sunday and Friday, followed by Thursday, with all adults, children, women, and men in both cities and agricultural areas as subjects.

As another datum concerning the popularity rate of television programs, Mr. Lorimor and Mr. Duna carried out a quantitative survey and made a report in the latter part of 1960's.

According to their report, the Egyptians in those days continued to watch television programs irrespective of the quality of the programs. 73 % of those who answered the questionnaires were watching television programs. 1 % of them were watching television for as many as 7 - 8 hours a day, and women were watching it for three hours more than men every day. (1968 - 1969 p.683)

As mentioned above, each one of the television programs is watched by more than 90 % of the entire viewers. This is a surprisingly high rate compared with that in America and Japan. In any part of Japan, viewers are able to watching programs to their liking, selecting them from the average of six different program channels -- two NHK channels (General and Educational) and three to eight commercial channels. So any program which has registered 25 % in popularity rating is regarded in

Japan as "very successful," and when the rating exceeds 30 %, that program is regarded "monstrous."

The reasons for this extremely high popularity rating of television programs in Egypt are summed up to the following three points:

- (1) There are only two channels from which they can choose. (By the way, Egypt has only ERTU and no commercial broadcasters)
- (2) The sources from which people can get information (publications, for example) and entertainment are scarce
- (3) The Egyptians (or Arabs in general) love dramas.

(3) The Egyptians attitude for dramas

The Egyptians are essentially kind-hearted, fun-loving and they have a high-sense of humor.

Both before and after the war of 1973, traditionally long serial feature films, stories, music, and slapstick comedies continued to be broadcast on television in Egypt to answer the people's needs.

In the midst of fast political changes, there was inevitably a pressure in Egypt sometimes to add to these programs more political, military or educational color, depending on the nature of the ruling government at the time.

However, the characteristic temper of the Egyptians as mentioned above has firmly persisted until today. And this characteristic is not limited to the Egyptians only but common to all the neighboring Arab nations.