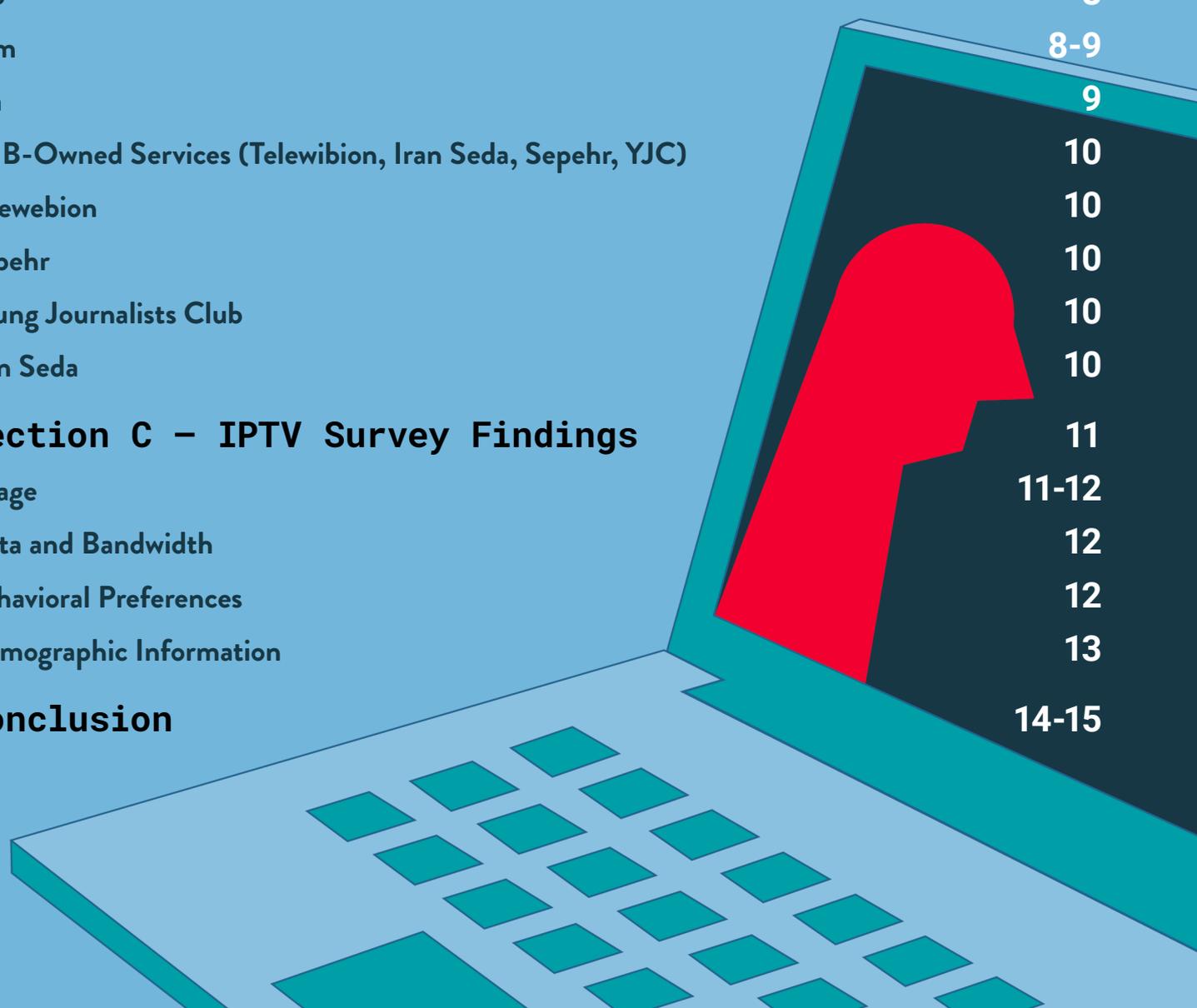


Internet Protocol Television in Iran

A Filterwatch Report

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An illustration of a laptop computer is positioned in the bottom right corner of the page. The laptop is light blue with a teal keyboard. The screen is black and displays a large, solid red arrow pointing upwards and to the right, symbolizing growth or progress.

Introduction

Media production and distribution has long been a point of contention in Iran. Since the Islamic Revolution in 1979, the state has continued to tighten its grip over broadcasting and multimedia production. With the evolution of digital media, Iranian society's attitudes to content consumption has changed significantly, undermining the state's established mechanisms of information control. Iran's response to these developments has included a pervasive system of Internet censorship, jamming satellite signals, and localisation of the Internet with the help of military and technocratic forces alike.

Meanwhile, there has been an increasing push from within for the privatization of broadcasting. These efforts have sought to alter users' attitude to domestic media and Internet infrastructure through improving media production standards, at the risky cost of lessening the scope of censorship. Under the outgoing Rouhani administration, multiple private businesses were licensed to pursue interactive broadcasting services. Several companies have launched Internet-protocol televisions (IPTV), including Over the Top (OTT) and Video-on-Demand (VOD) services, offering exclusive programming. However, the shift has not been without backlash from conservatives and the Islamic Republic of Iran Broadcasting (IRIB) – the state-owned broadcaster that views itself as sole authority over matters of multimedia.

This report offers a deep dive into the political tension over the increasing presence of private Internet-based televisions in Iran's media landscape, going back to the 2000s. It emphasizes the state broadcasters approach to regulating these televisions and integrating them into a state-sanctioned media ecosystem. The report analyses the power struggle that they have sparked and their significance to Iran's National Information Network and data localization policies. It also

presents the results of a first-ever survey on public attitudes toward these platforms, including their implication for the prospect of IPTVs and media consumption in Iran. It concludes with an analysis of the opportunities and risks that this new medium entails from the internet and media policy perspective.

Definitions

IPTV: Internet-protocol (IP) televisions broadly refer to live content on IP. Unlike cable and satellite television, IPTV provides traditional television services, such as live channels to the viewer's home through internet service provider (ISP) networks. IPTV can also provide high-speed data transfer that enables streaming of multimedia. These services require a set-top box and a stable internet connection. IPTV services can be categorized into three main types: (1) live television, with or without interactivity; (2) Video-on-Demand; and (3) time-shifted media, for example catch-up functionalities that enable viewing a show that was aired days or hours ago, or rewatching a live show from the start.

VOD: Video-on-Demand services provide users with the choice to access a wide range of video or audio-based media, rather than forcing them to wait for a service provider to broadcast scheduled programs. IPTV is frequently used together with VOD on televisions and computers, albeit at a lower video quality, often limited by internet speed. VOD systems can stream via most devices like set-top boxes, computers, smartphones, or any gadget that allows for live streams, or for users to download content to watch later.

OTT: Over-the-Top streaming refers to a service provider that independently supplies videos to internet viewers but does not rely on traditional broadcasters or media channels. These services are online, on-demand, and subscription-based. They enable access to a variety of content using computers, televisions, set-top boxes, and other devices that have access to the Internet.

This report uses the term IPTV broadly, referring to a range of services that include VOD, OTT, and time-shifted media. The reason is two-fold: first, IPTV is the commonly used term by both state authorities and the media to refer to these services. Second, using this umbrella term helped our survey (in Section C) to avoid jargon and remain as accessible as possible to a broad spectrum of respondents.

Section A – Private Television in Iran: Past and Present

The rise of private online video and media sharing platforms in Iran has not been without political friction and competition. During the contested 2009 presidential elections, the campaign of reformist frontrunner Mir Hossein Mousavi launched an online television channel, Ghalam.¹ It was blocked almost immediately by the Commission to Determine Incidents of Criminal Content (CDICC), the Judiciary's bureau in charge of Internet filtering matters. Following the contested victory of the conservative incumbent, Mahmoud Ahmadinejad, the other reformist candidate, Mehdi Karoubi, announced his plans to launch a private television channel run by Behrouz Afkhami, a movie director and former member of parliament in the 1990s and early 2000s.² Afkhami was arrested by intelligence services and Karoubi's ambitions did not materialize. Less than a year later, Karoubi, along with Mousavi and his wife Zahra Rahnavard, were put under house arrest, which continues to date.

In 2012, then-Minister of Culture and Islamic Guidance, Mohammad Hosseini, asserted that private televisions were outlawed by the Constitution. At the time, Hosseini was reacting to initiatives by conservative figures and factions to run private television channels, some of which were solely Internet-based³ and were deemed as competitors to the Islamic Republic of Iran Broadcasting (IRIB), the state-owned broadcaster.

The recurring stand-off with the government underscored the existential significance of the IRIB's media monopoly to the Islamic Republic – a power struggle that remains just as potent to date. Article 44 of Iran's Constitution considers content production and broadcasting as the state's sole authority. Article 7 of the IRIB's Statute (a binding foundational document that governs IRIB) grants a monopoly to the organization, warranting legal action against any violations of broadcasting rights. However, advances in digital media and broadcasting technologies have raised questions about the applicability of these legal clauses to new forms of broadcasting. Meanwhile, the IRIB, whose Director-General is appointed by the Supreme Leader, continues to act as the uncontested propaganda arm of the Islamic Republic. It remains one of the country's best-funded entities, with a budget as large as some of Iran's ministries. Previous parliamentary efforts to revise the oversight rules and regulations that govern IRIB have repeatedly failed.⁴

The IRIB has been adamant that it is the sole regulating body responsible for licensing and broadcasting video and music online – a position that has been strongly contested by Rouhani's administration. In a September 2015 letter to

1 Donya-e-Eqtesad, 10/05/2009, "Mir Hossein Mousavi's Internet-Protocol Television" [Persian], available at: <https://www.magiran.com/article/1855699>

2 Nahid Siamdoust, LA Times, 09/01/2006, "Iran Cleric Struggles to Get Alternative Views to TV Screens", available at: <http://lat.ms/3dckwuB>

3 Reporters Without Borders, "Iran's Minister for Culture and Islamic Guidance: No Private TV Licenses Will Be Given to Anyone" [Persian], available at: <http://bit.ly/39HABVA>

4 Vigiato, 8/05/2020, "What is SATRA? IRIB, Cyberspace, VOD, Regulatory and Other Issues" [Persian] available at: <https://vigiato.net/p/91423>

President Rouhani (in his capacity as the head of the Supreme Council for Cyberspace), Supreme Leader Ali Khamenei asserted that the IRIB was in charge of all matters related to multimedia content in cyberspace. The order was a first step towards granting significant power to the IRIB in relation to online media production and broadcasting.⁵

IRIB swiftly moved to cement its authority. It issued licenses for five entities to launch their Internet Protocol Televisions (IPTVs) in January 2016 (see more on these under Section B).⁶ That same year, the IRIB sued Aparat, the most successful domestic video sharing platform, and an effective analogue of YouTube. Aparat was accused of operating illegally, without an IRIB-issued license. The IRIB considered itself the sole authority on matters of digital media, on the basis of the organization's Statute and the Supreme Leader's order. IRIB also established the nascent Organisation for Regulating Online Audio and Video (SATRA).⁷

In May 2016, the Cultural Commission of Iran's parliament proposed the "Universal Authority over Multimedia Matters Act", which granted the right to regulate online multimedia content to the IRIB. The proposal remained dormant until April 2018, when the conservative members of the commission announced that they had voted in favor of the IRIB's oversight of online multimedia content. The announcement prompted a backlash from the reformist members of the committee and the ICT Minister, who contested the lack of clear definitions around the audio and video content set to be regulated by the IRIB.⁸ Iran's parliament never voted on the bill beyond the committee stage.

⁵ Ibid

⁶ Taadol Newspaper, 19/02/2017, "Positive Steps for Interactive TV Privatisation" [Persian] available at: <http://bit.ly/2KIRvR3>

⁷ SATRA, About Us [Persian], available at: <https://bit.ly/39x8tEX>

⁸ Vigiato, 8/05/2020, "What is SATRA? IRIB, Cyberspace, VOD, Regulatory and Other Issues" [Persian], available at: <https://vigiato.net/p/91423>

Nonetheless, the policy represented the persistent will of conservatives to consolidate the IRIB's oversight power over all multimedia content.

In the meantime, SATRA continued to assert its authority over broadcasting any multimedia content – virtual or otherwise. In 2018, the organization issued permanent licences to four interactive TV stations (IPTVs) and seven audio and video media institutes.⁹ SATRA also sought to establish itself as the governing authority over domestic Video-on-Demand (VOD) services. Previously, these services received production licenses from the Ministry of Islamic Culture and Guidance (part of the executive branch) and had become a popular alternative to IRIB productions, free from intrusive state censorship. Under the new rules, VOD platforms were required to obtain a secondary license from SATRA for broadcasting. The change prompted confusion among license applicants and prompted pushback from the government.¹⁰ SATRA has also used its oversight power to censor VOD productions¹¹ – a measure that has inevitably affected the popularity of these services.

In January 2020, Iran's Judiciary sought to consolidate the IRIB's power to regulate all multimedia content. Ebrahim Raisi, the then-Judiciary Chief (another appointee of the Supreme Leader) and the current president, issued a letter that deemed any activity without appropriate licensing from IRIB was unauthorized.¹² The Rouhani administration sharply criticized the

⁹ SNA, 03/05/2018, "Licenses for 4 Interactive TVs and 7 Audio Visual Media Institutions" [Persian], available at: <http://bit.ly/35ONegm>

¹⁰ Vigiato, 8/05/2020, "What is SATRA? IRIB, Cyberspace, VOD, Regulatory and Other Issues" [Persian], available at: <https://vigiato.net/p/91423>

¹¹ Iran International, 09/07/2021, "Who will be the next chief of Iran's state broadcaster, IRIB?", available at: <https://bit.ly/3AzTWnY>

¹² Seyed Ebrahim Raisi, 18/01/2020, "Judiciary Directive" [Persian], available at: <https://bit.ly/3anTUoy>

judiciary for ruling on a matter outside of its jurisdiction, arguing that the issue falls within the mandate of the SCC.¹³

In February 2020, the Supreme Court of Administrative Justice outlawed the jurisdiction of Communications Regulatory Authority (CRA),¹⁴ a regulatory body that is headed by the ICT Minister, over production and infrastructure issues related to multimedia content.¹⁵ The Court referred to Article 44 of the Constitution, which deems content production and broadcasting as the state's sole authority, the Supreme Leader's letter from 2015, and a Guardian Council opinion from October 2000, which outlawed private broadcasters, regardless of the medium, without oversight from the IRIB.¹⁶

In June 2020 the SCC, the highest Internet policy-making body which reports to the Supreme Leader, announced its plans to arbitrate on the matter. To avoid further confusion and to secure the best interests of domestic platforms, the SCC would hear arguments of the main stakeholders (i.e. the government and the IRIB), and consolidate its policy.¹⁷ At the time of writing, the SCC has yet to set any policy in relation to this controversial matter.¹⁸

13 BBC Persian, 26/01/2020, "Government criticises issuing of exclusive digital video and audio to IRIB" [Persian], available at: <http://bbc.in/3qjRGfs>

14 Communications Regulatory Authority, About Us, available at: <https://www.cra.ir/en/enhome>

15 ISNA, 04/02/2020, "Supreme Court of Administrative Justice: Production and distribution of VOD services [is] exclusively in the state broadcasters capacity" [Persian], available at: <https://bit.ly/3xmGstb>

16 Parliamentary Research Centre, 02/02/2020, "Supreme Court of Administrative Justice Vote on Case Number 9809970905813148" [Persian], available at: <https://rc.majlis.ir/fa/law/show/1488525>

17 Mehr News, 12/06/2020, "The entrance of the SCC into the field of VOD" [Persian], available at: <http://bit.ly/2LHW3Sn>

18 Islamic Republic News Agency, 18/12/2020, "SCC to determine examples of VOD services" Persian, available at: <https://bit.ly/3A4Ps8p>

Despite the licensing saga, Internet-based televisions have become a crucial part of Iran's domestic network infrastructure, commonly known as the National Information Network (NIN). The government has continued to advocate for high quality productions by privately-owned companies to attract Internet users to these platforms that route traffic via the NIN. The SCC has also emphasized that VOD platforms are required to dedicate at least 40% of their bandwidth to domestic content, produced according to cultural, political, and religious considerations.¹⁹ With the promise of faster speed at lower costs, Iran seeks to nudge the population toward using the NIN, hoping to make the uncensored international platforms less appealing to users. This strategy of data localization complicates an already-pervasive censorship apparatus, as it adopts less detectable and controversial means to promote state-sanctioned content and shape consumers' preferences.

IPTVs and Elections

IPTVs made headlines during Iran's presidential elections in June 2021. As in-person campaigning and rallies were constrained by the COVID-19 pandemic, online campaigning became even more crucial for the election hopefuls. The government and IRIB took a number of separate measures to facilitate campaigning and increase the anticipated, low participation rates. ICT Minister Mohammad-Javad Azari Jahromi announced a free, month-long 7GB mobile internet package for all Iranians in the run-up to the elections.²⁰

19 Peivast, 22/02/2020, "Production of domestic content for VOD should reach 40%" [Persian], available at: <https://peivast.com/p/70466>

20 Azari-Jahromi added: "Don't ask if it is [just] for the domestic internet, the internet is an international network," suggesting that the package was to enable access to the global Internet and not just the NIN.

Meanwhile, the IRIB secured a dedicated signal to establish one IPTV for each presidential candidate and the Audiovisual Regulatory Authority (SATRA) immediately issued licenses for these televisions.²¹ Within days, then-candidate Ebrahim Raisi²² and Saeed Jalili,²³ the former lead nuclear negotiator under the Ahmadinejad administration, launched their own televisions for broadcast over several IRIB-endorsed platforms, including Telewebion, Lenz, and Tva (see Section B for details).

SATRA's Growing Authority

During presidential election campaigns, SATRA sought to set rules for domestic social media and user-generated content sharing platforms, raising concerns about the agency overstepping its mandate. On May 11 the Iranian video streaming platform Aparat tweeted that SATRA had ordered the removal of an interview with former president Mahmoud Ahmadinejad by political analyst Ali Alizadeh. Without specifying the reason for the removal, Aparat complained that conflicting policies in cyberspace had once again targeted domestic services with criticism for violating users' rights. The removal was met with widespread criticism and public backlash. In a later interview, a SATRA Deputy, Vahid Farahmand, referred to the removal request as "an error" and a "gap in communication," suggesting that Aparat would be able to republish the video.

Days later, on May 21, the General Manager of SATRA shared details of regulations for election-related activities. The list covered such topics as verifying "official pages" for candidates upon request, labeling "election-related" content for easy identification,

moderating content to combat the spread of false information, and removing any content that violates national election laws.

SATRA's attempts to set election-related regulations signals its growing authority over matters that may have previously been ruled by the CDICC and the judiciary. But it also suggests a conflicting understanding of – and possibly inter-agency disputes over – SATRA's actual authority. Time will tell how far SATRA is willing to push for further regulatory power.

Section B – An Overview of IRIB-Endorsed Internet Protocol Television Services

SATRA's growing authority suggests that IRIB has triumphed over the executive brand, at least for now. While SATRA continues to issue licenses for operating private IPTVs, IRIB has pursued a two-fold rebranding strategy in this field. IRIB has acquired IPTVs of its own that recycle state-produced content under new brand names, such as Sepehr and Iran Seda. Moreover, IRIB has contracted with several prominent private service providers that seek to expand the reach of IRIB programs. The contractual relationship means that in addition to privately produced (or dubbed) content, these platforms are expected to broadcast IRIB content as well. This arrangement expands the IRIB's reach and ensures that even viewers who do not typically follow its programming are exposed to IRIB shows on digital devices at low (and sometimes no) cost.

This section offers an overview of IPTV services that IRIB formally promotes as "interactive television services" as either 'IRIB contractors' or 'IRIB-owned services'. It does not include all the

²¹ IRINN, 31/02/2021, "Dedicated IPTV channels for a number of [presidential] candidates" [Persian], available at: <https://bit.ly/3yfmXnY>

²² Donya-e-Eqtasad, 04/06/2021, "Ebrahim Raisi launches IPTV channel" [Persian], available at: <https://bit.ly/3BPnxf>

²³ Mehr News, 01/06/2021, "Saeed Jalili launches IPTV channel" [Persian], available at: <https://bit.ly/3I7RT5y>

existing, licensed IPTV, VOD, OTT, and other services in Iran. Despite their growing popularity, the IRIB has not yet endorsed any privately-owned VOD services such as Filimo and Namasha. Instead, more emphasis is placed on IPTV streaming because of the extended viewership that it brings to IRIB programs – VODs do not offer the same added value.

Thus, this section only includes services that have an established relationship with IRIB, be it through ownership or contractual engagement. The distinction is significant in that these platforms help to expand IRIB's reach in exchange for higher recognition from the state broadcaster. Tables 1 and 2 present a summary overview of these services.

IRIB Contractors (Lenz, Aio, Fam, and Tva)

In January 2016, five companies, including IranCell, Baran Telecom, Aseman, Tarasheh-ye-Sabz, and Nashr-e-Electronic, were licensed to operate Internet-based televisions. However, the licences were subsequently withdrawn amidst disagreements between the IRIB and the ICT Ministry over whether the former was authorised to do so in the first place. After much debate, new licences were reissued in October 2016 to the same companies, all of which – except for Nashr-e-Electronic²⁴ – are currently official contractors of the IRIB.

Lenz

IranCell, a local affiliate of South Africa's MTN, was among the early IRIB licensees and launched its

IPTV, Lenz, in January 2016.²⁵ Lenz offers access to a wide range of on-demand Persian content, including movies, TV shows, sports events, Iran's national channels, and music events.²⁶ The service offers a seven-day catch-up functionality as well as a cloud-based DVR service in high resolution.²⁷ The Lenz mobile app is available on Google Play²⁸ with over a million downloads and on the Iranian App Store, Sib Irani²⁹ with over 17,000 downloads.

Aio

Baran Telecom, a conglomerate of Internet and web services providers, is the parent company of Internet-based television, Aio.³⁰ In addition to all IRIB channels, it offers multiple exclusive channels for sports, entertainment, and cartoons. Aio is available on smartphones, web browsers, tablets, set-top boxes, and Samsung smart televisions with a fourteen-day catchup functionality. Its Android and iOS applications are available on Google Play³¹ and Sib Irani,³² with over 500,000 and 7,000 downloads respectively.

Fam

Fam is owned by Aseman, an affiliate company of the Tos'e Etemad Mobin Consortium that is

²⁴ Nashr-e-Electronic is a subsidiary of the Organization for Islamic Propaganda that was licensed to launch two IPTVs and user-generated content platforms, Shamin and Sheema. Read more at: http://iep.co.ir/?page_id=37

²⁵ About Lenz [Persian], available at: <https://eirib.ir/content/1342/lenz/>

²⁶ For snapshots of Lenz's programming, see: https://www.instagram.com/lenz_iptv/

²⁷ Digital TV, 20/02/2017, "Iran's MTN-Irancell launchest TV offering", available at: <https://bit.ly/3zFoTGB>

²⁸ Lenz's app page on the Google Play Store: <https://bit.ly/3kBiJ5p>

²⁹ The Lenz mobile app's page on Sib Irani, <https://bit.ly/39zIQVf> [note that Sib Irani was launched in part in response to the takedown of Iranian applications from the App Store – a measure that has been interpreted as overcompliance with the comprehensive US sanctions regime on Iran (TK).]

³⁰ About Aio [Persian], available at: <https://bit.ly/3CJZaOM>

³¹ Aio's mobile app page on the Google Play Store: <https://bit.ly/3u925gF>

³² Aio's mobile app page on Sib Irani: <https://bit.ly/3klejKy>

Table 1. Private contractors of IRIB

IRIB Contractors

	Parent Company	Type of Content	Android	iOS	Web app	Set-top box enabled	Catch-up functionality
Lenz	Iran Cell	Movies, entertainment, sports, IRIB channels	1M+	17k+			Yes (up to 7 days)
Aio	Baran Telecom	Movies, entertainment, sports, cartoons, IRIB channels	500K+	7k+		Yes (also on Samsung smart television)	Yes (up to 14 days)
Fam	Aseman (affiliated with IRGC)	Movies, entertainment, music, IRIB channels	10K+	N/A	Yes	Yes	?
Tva	Tarasheh-ye-Sabz	Movies, music, sports, childrens entertainment, IRIB channels	150K+	2K+		?	?

co-owned by the Islamic Revolutionary Guard Corps (IRGC) and the Executive Headquarter of Imam Khomeini’s Directive. In 2009, the Mobin Consortium bid for and won 51% of stocks in Telecommunications Company of Iran (TCI),³³ Iran’s state-owned Internet provider and the main authority over telecommunications infrastructure. The transaction raised concerns about the prospect of privacy and digital rights in Iran in light of IRGC’s direct authority over the telecommunications infrastructure.

In 2016, the Consortium launched its first IPTV service, Fam (فام),³⁴ which is available on smartphones, smart televisions, and a dedicated set-top box.³⁵ Its Android application (for smartphone and television) is available on Cafe Bazar, the Iranian Google Play store,³⁶ with over 10,000 active downloads. Fam offers an extensive database of movies, television shows, music, and live broadcasts of Iran’s national channels, with a catchup functionality.

Fam’s Android app offers a 50-percent discount in mobile data usage to subscribers of IranCell, Mobile Communications of Iran (MCI), and Rightel. As an additional incentive, it also offers a data cap exemption to customers of several major ISPs such as AsiaTech, Shatel, and Pars Online.

Tva

Tva (تیوا) is a product of Tarasheh-ye-Sabz.³⁷ It comes preinstalled on a dedicated set-top box³⁸ (Tbox) and its Android³⁹ and iOS⁴⁰ applications have been downloaded 150,000 and 2,000 times respectively. In addition to IRIB channels, Tva offers exclusive channels targeting children, cinephiles, and music and sports fans. Tva offers free traffic to ParsOnline customers.⁴¹

33 Eghtesad-e-Shahrvand, “Everything about the Tos’e Etemad Mobin Consortium: the owner of the Telecommunications Company of Iran” [Persian], available at: <https://bit.ly/3wZR2GI>

34 Fam’s official website [Persian], available at: <https://www.fam.ir/>

35 About Fam [Persian], available at: <https://eirib.ir/content/1343/fam/>

36 Fam’s app page on Cafe Bazar: <https://bit.ly/2ZixQZI>

37 About Tva [Persian], available at: <https://eirib.ir/content/181/tiva/>

38 Tva’s official website: <http://tva.ir/info/>

39 Tva is available on Cafe Bazar with over 50,000 active downloads and on Google Play with more than 100,000 installs. See <https://bit.ly/3kzORIt> and <https://bit.ly/3EOtUjy>

40 Tva’s app page on Sib Irani: <https://sibirani.com/apps/Tva/>

41 Pars Online, “Watch free movies on Tva with Pars Online” [Persian], available at: <https://bit.ly/3IVHyIP>

Table 2. IRIB-owned IPTVs

IRIB Services

	Type of Content	Android	iOS	Web app	Set-top box enabled	Catch-up functionality	Cost
Telewebion	Full archive and live broadcast of IRIB	20M+	4k+	Yes	No	Yes (up to 7 days)	Free
Iran Seda	Audio only	200K+	7.5k+	Yes	No	?	
Sepehr	IRIB live broadcast (radio and television)	200K+	No	Yes	No	No	
YJC	IRIB live broadcast (radio and television)	1K+	No	Yes	No	Yes (up to 3 hours on the web app)	

IRIB-Owned Services (Telewebion, Iran Seda, Sepehr, YJC)

Telewebion

Telewebion has become one of the most popular platforms for IRIB’s live broadcasts and a comprehensive archive of its programs. It offers a web version – with reportedly more than 1.5 million unique users in Iran⁴² – as well as Android and iOS applications, with over 10 million⁴³ and 4,000⁴⁴ installs, respectively. The website ranking service Alexa ranks Telewebion as the fifth most visited site in Iran.⁴⁵

Sepehr

Similarly, Sepehr is a web and Android-based service that currently offers live broadcast of all regional, national, and international channels. It only charges 512kbps per view of the broadcast, a particularly attractive deal for low-income internet users.

Young Journalists Club

The IRIB website lists Young Journalists Club (YJC), a hardline news agency, as an IPTV provider. However, what YJC offers as “livecast” under a subdomain⁴⁶ is live broadcasts of IRIB channels that are pulled directly from the broadcaster or via Sepehr. The programs are available on YJC’s web and Android versions.

Iran Seda

Iran Seda is an audio-only service with web, Android, and iOS versions, with more than 200,000 and 7,500 installs on Cafe Bazar⁴⁷ and SibChe⁴⁸ (another domestic alternative to the App Store). The service offers live broadcast as well as a comprehensive archive of IRIB radio shows. In addition, Iran Seda includes dedicated portals of state-sanctioned children content, Persian music, audio books, sermons, prayers, and Quranic recitals.⁴⁹

⁴² About Telewebion [Persian], available at: <https://bit.ly/2XEP825>
⁴³ Telewebion’s mobile app on the Google Play Store: <https://bit.ly/39Arnec>
⁴⁴ Telewebion’s mobile app on Sib Irani: <https://bit.ly/3zFvHnd>
⁴⁵ Alexa rankings for top sites in Iran: <https://bit.ly/2XX3f39>

⁴⁶ Young Journalists Club’s “livecast” services: <https://www.yjc.news/fa/live>
⁴⁷ Iran Seda’s app page on Cafe Bazar: <https://bit.ly/3AHMBCR>
⁴⁸ Iran Seda’s app page on SibChe: <https://bit.ly/3kD3j0u>
⁴⁹ Iran Seda’s official website: <http://iranseda.ir/>

IPTVs were envisioned as an avenue for media plurality in Iran. However, the growing list of IRIB-endorsed IPTVs suggests that the state broadcaster is adamant to harden its oversight over multimedia platforms, regardless of format and underlying technologies. Thus far, IRIB has successfully neutralized the challenge from the executive branch. It continues to expand its authority over Internet-based televisions, even utilizing privately-owned platforms to its benefit.

Section C – IPTV Survey Findings

Despite the contentious history of IPTVs and their growing presence in the social and political life of Iranians, little has been known about the public's perception of these services. To understand how these platforms are received by Iranians, Filterwatch published a survey and promoted it via social media and web platforms between March 19 and April 7, 2021.

In particular, the survey asked participants about their familiarity with and frequency of using the existing IPTVs, as well as the reason for choosing these services. It also sought to understand participants' overall access to the internet and satellite televisions, and whether demographics impacted their approach to IPTVs.

A total of 106 respondents participated in the survey, a relatively small sample size that may not be generalized to the entire population. Nonetheless, these responses provide an unprecedented look into the IPTV landscape in Iran.

The survey did not use the distinction that IRIB makes between contractors and state-owned services. Nor did it distinguish between IPTV and VOD as two overlapping concepts to avoid confusing the audience with unnecessary jargon. Instead, the survey referred to IPTV as the umbrella

concept that accommodates a variety of services beyond Internet-protocol television, including VOD and OTT services. This approach is compatible with the way most IPTV services have come to be in Iran. Instead of producing live broadcasts of their own, they rely on IRIB programming and use additional resources to produce, curate, dub, and purchase licenses to broadcast concerts, conferences, and sporting events. In sum, the survey is a preliminary step to understanding the IPTV market and can be expanded on for future research.

Usage

47.2% of participants were in no way familiar with any existing IPTV. Among those who expressed some familiarity with these services, Lenz appeared to be best-known (34%), followed by TV Plus (18.9%), iGap (15.1%),⁵⁰ and Aio (14.2%). Private services, regardless of their contractual status with IRIB, seem to be among the most familiar brands.

The results were less significant about the usage of IPTVs. 60% said they had not used any Internet-based television over the past year. Among those who had some experience with these services, Lenz (19%) was the most popular, followed by TV Plus (15%), and Aio (8%). A much smaller percentage (1%) knew of – or had used – such services as Telewebion, Filimo, Namava, Namasha, Anten, and MyTV – all private services and independent from the IRIB. The most popular IPTV content includes movies (64.5%), scientific and educational content (40.8%), and sports (39.5%). Other categories include news (36.8%) and children entertainment (13.2%).

50 Despite receiving a broadcasting license in 2019, iGap television does not seem to be active yet. But familiarity with the brand, which increased in the aftermath of the controversial blocking of Telegram Iran in 2018, may explain its appearance on the list of most familiar services. For accuracy, we had to omit iGap from the results. Read more at: <https://bit.ly/3rLCGZh> and <https://bit.ly/3fapCYk>

“Ease of use” is the most cited reason (50%) for adopting an IPTV, followed by the high speed of these domestic services (44%), data cap exemption (38.5%), and linguistic and cultural considerations (27%). Because international VOD services like Netflix are blocked in Iran, they can only be accessed via circumvention tools, forcing users to use more bandwidth and pay more for data. State-endorsed IPTVs mitigate these factors by offering free or half-priced data and by routing the traffic through Iran’s domestic network (NIN), making these platforms an appealing alternative to international services.

Data and Bandwidth

The data packages that respondents used to access IPTV varied significantly. 32% said they had access to unlimited data, a higher-price option that is most common among better educated and higher income groups. In second place (26.4%) came data plans ranging between 500 MB and 1GB per month, and 12% had access to plans with less than 500 MB data. Others (32%) did not specify, leaving a relatively large margin for interpretation.

Behavioral Preferences

Most respondents (70.4%) said they used the Internet multiple hours a day, but the same does not hold for IPTV usage. Only 24% spend over 10 hours per week watching state-sanctioned content online, and 50% use it less than one hour per week.

How often do you use IPTV streaming?
83 responses

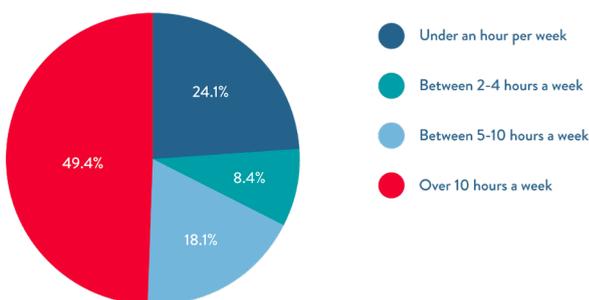


Figure 1. How often do you use IPTV streaming?

Domestic IPTVs are often perceived as the state’s attempt to compete with satellite television channels that are broadcast from overseas and not subject to state censorship. We tested the hypothesis that Iranians with access to satellite television would not be inclined to use a state-sanctioned IPTV. 58% of respondents said they had access to satellite television and 36% reported spending more than 10 hours per week watching satellite content.

However, no meaningful correlation was found between having access to satellite television and the frequency of consuming IPTV content. We observed multiple comments that respondents saw no conflict between the two, likely because they used these mediums at different times and for varying purposes. Particularly, we asked respondents without access to satellite television whether they would use IPTV as frequently if they could access an international, uncensored alternative, and the answer was 71% positive.

Do you have access to satellite television?
95 responses

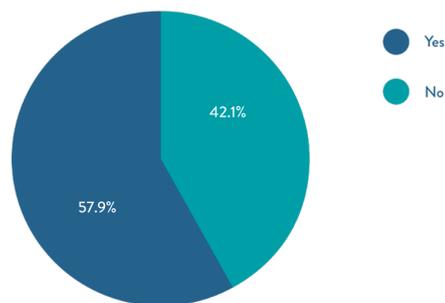


Figure 2. Do you have access to satellite television?

Would you still use IPTV services if you had access to satellite television?
87 responses

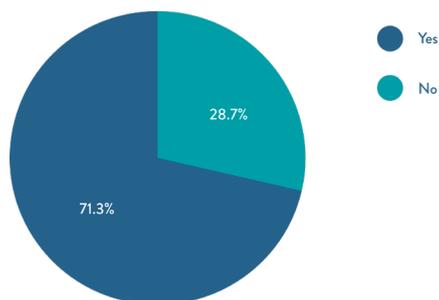


Figure 3. Would you still use IPTV services if you had access to satellite television?

Demographic Information

When asked about the type of devices they used to access IPTV, 71% said they used a personal smartphone, 21.7% used web browsers, 15.7% used a smart television app, and 15.7% used a dedicated set-top box.⁵¹ These responses align with two nationwide surveys from 2020⁵² and 2021⁵³ that estimated a 69-percent penetration rate of smartphones in Iran.

Demographically, over 90% of respondents identified as male and just under 10% as female. Women used IPTVs mainly to follow news and watch movies whereas men’s favorite content included movies, educational content, and sports. Women spend an average of 5 hours per week on these platforms, slightly higher than men’s weekly average of 4.

Geographic distribution of responses leaned toward Tehran, the capital city (25%), and other major provinces including Mazandaran (8%), Hamedan (7%), and Isfahan (6%). Reported educational levels varied across high school diploma or lower (42%), college education (associate and bachelor’s degrees) (37%), and graduate degrees (MA, PhD, post-doc) (21%).

Your highest level of education?
103 responses

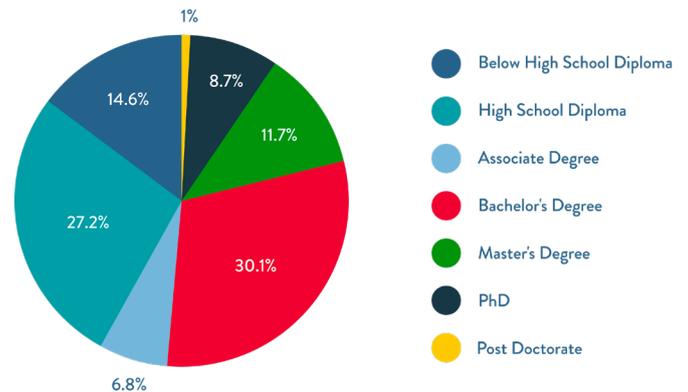


Figure 4. Your highest level of education?

Gender breakdown of survey respondents
93 responses

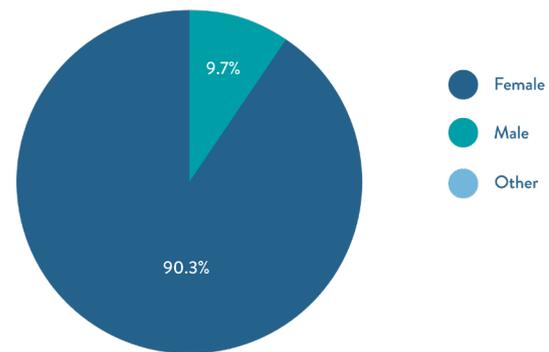


Figure 5. Gender breakdown of survey respondents

⁵¹ Similarly, 93% of respondents said they used smartphones to access the Internet, followed by personal computers (44%), work computers (19%), and tablets (15%).

⁵² Eghtesadonline, 26/05/2019, “What percentage of Iranians own smartphones” [Persian], available at: <https://bit.ly/3ibPtB5>

⁵³ Tejaratnews, 03/02/2021, “Mobile and tablet penetration rates in Iran/over half of Iranians own smartphones” [Persian], available at: <https://bit.ly/3iald9D>

Conclusion

Internet protocol televisions have become an avenue for media plurality in Iran. They offer a challenge to IRIB's historical monopoly over the flow of state-sanctioned multimedia content. While some IRIB services in this space, such as Telewebion, have become popular, the overall public attitude toward private companies remains more positive. The diversity and quality of programs offered by these providers, along with the perception of reduced state oversight seem to be a significant factor in their relative popularity. Yet IRIB's recent efforts to utilize private IPTVs during election campaigns suggests that their popularity can still be taken advantage of for political purposes.

These platforms also offer a convenient tool for nudging Iranians toward using domestic platforms and infrastructure via socio-economic motives. IPTVs cut the need for circumvention tools and offer higher bandwidth speed at lower costs. As Iran's economy continues to struggle due to mismanagement and the impact of international sanctions, these factors appeal to a significant portion of the population that desires access to high-quality content, but which continues to grapple with economic hardship. Our survey results suggest that while Iranians' use of IPTVs remains fairly low, the incentivizing factors for their use may change public attitudes toward these platforms in the longer term. This approach will only perpetuate the embedded, unmeasurable, and less traceable censorship model that Iran has pursued through various data localization policies.

The increasing political and financial importance of online broadcasting in Iran has fueled an ongoing power struggle between the government and IRIB. First, the Internet and foreign-based satellite televisions have continued to undermine the IRIB's monopoly over state-approved information. Iran's response to these external threats has been filtering

of the Internet, the jamming of satellite signals, and the nationalization of cyberspace.

The National Information Network (NIN) is the state's central project in seeking to centralize Iranians' access to information, by offering domestic content, platforms, services, and digital infrastructure. From the government's perspective, it is not only the ultimate authority over the development and expansion of the NIN, but also over content quality control on this network.

However, the IRIB considers Internet-based television services to be operating in competition with its productions, undermining its viewership and decades-long monopoly. But for online television networks, the unpopular IRIB's oversight means the policing of content, the lower quality of their productions, and, ultimately, reduced subscriptions and popularity. This is why the Rouhani administration argued for the government to maintain oversight over these platforms. Yet through legal and political battles, IRIB has successfully neutralised the challenge from the government. Those who wished for IPTVs to undermine the IRIB's monopoly over broadcasting seem to have lost, at least for now.

Furthermore, private online television services are viewed as a source of additional income generation for any organization that oversees them. It is no surprise that both the government and IRIB have been racing to maintain their grip over these platforms. In exchange for a license, IRIB currently takes 50% of total revenue of online television networks and sues those who operate without a license⁵⁴ (and it has had the Judiciary on its side, too).

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Digiato, 23/04/2018, "IRIB wants 50% of the revenue from audio and video activities" [Persian], available at: <https://bit.ly/3dlHZJT>

The Rouhani administration, however, considered these platforms as attractive tools to lure Internet users towards using the NIN's infrastructure and services – a small concession of state control in exchange for long-term payoffs by changing users' behavior and simultaneously nationalizing the Internet.

Online televisions can, in theory, play an important role in breaking the IRIB's monopoly over multimedia content and be a major leap toward media plurality in Iran. But the current governance model of these platforms assumes a central role for IRIB to execute the state's policies and priorities. This stands against the principles of media plurality and democratic governance of the media. The new conservative administration of President Ebrahim Raisi is more likely to concede and side with the IRIB, reinforcing the major battles that the state broadcaster has fought and won thus far. Raisi's record, in particular his 2020 order that consolidated IRIB's authority over any multimedia content, leaves little room for doubt on whose side he stands. His tenure could mean the last straw for privately-owned service providers that wished to democratize broadcasting in one of the most censored countries.

