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EUROPEAN AUDIOVISUAL OBSERVATORY
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FILM AND AUDIOVISUAL DATA COLLECTION PROJECT

PROJET DE COLLECTE DE DONNÉES SUR LE CINÉMA ET L'AUDIOVISUEL

PROJECT OF STATISCAL DATA COLLECTION ON FILM AND AUDIOVISUAL MARKETS IN 9 MEDITERRANEAN COUNTRIES

Country profile: 2. MOROCCO

EUROMED AUDIOVISUAL III / CDSU in collaboration with the EUROPEAN AUDIOVISUAL OBSERVATORY

Dr. Sahar Ali, Media Expert, CDSU Euromed Audiovisual III

Under the supervision of Dr. André Lange, Head of the Department for Information on Markets and Financing, European Audiovisual Observatory (Council of Europe)

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The report is available on the programme website:

www.euromedaudiovisual.net

Preface

The present report is the second country profile carried out under the data collection project in the 9 countries of Euromed Audiovisual III partnership initiated by Euromed Audiovisual III of the European Union in collaboration with the European Audiovisual Observatory (Council of Europe).

The report aims at providing an overview of recent progress in the audiovisual sector in Morocco. For a discussion of earlier developments, the reader may refer to earlier reports cited in the bibliography.

The report testifies to the significant effort undertaken by the Moroccan authorities and professionals of the sector to design an ambitious film and audiovisual policy, taking into account the new legal framework established by the Constitution adopted by the Moroccan people on 1st July 2011. This policy is combined with a will to improve transparency in the sector; which is reflected by the extensive amount of information both on film and television that this report offers.

Euromed Audiovisual Programme and the European Audiovisual Observatory would like to thank the Moroccan organizations which have assisted Miss Sahar Ali in drafting the present report.

This report was produced by Sahar Ali, Media Expert, at Euromed Audiovisual III of the European Union, under the supervision of André Lange, Head of the Information Department on markets and financing, European Audiovisual Observatory. The proposed conclusions are made by the author and do not involve the responsibility of the European Commission, or the European Audiovisual Observatory, or its members, or the Council of Europe.

Tunis/Strasbourg, 21st March 2013

Berthold Wohlleber

Team Leader
Euromed Audiovisual III

André Lange

Head of the Department for
Information on markets and financing
European Audiovisual Observatory
(Council of Europe)

NATIONAL AUDIOVISUAL LANDSCAPES IN THE NINE PARTNER COUNTRIES

MOROCCO.

Preface

1. BASIC DATA	7
1.1. Institutions	7
1.2. Landmarks	8
1.3. The economic context	9
1.4. Membership of Morocco and its public audiovisual bodies in active international organizations in the audiovisual sector	11
1.5. Links with European institutions	12
1.5.1. The European Union	12
1.5.2. The Council of Europe	15
1.5.3. OSCE	17
2. DEVELOPMENT OF TELECOMMUNICATION INFRASTRUCTURE	18
2.1. A policy aiming at developing telecommunication infrastructure	18
2.2. Data on telecommunication infrastructure	21
3. TELEVISION REGULATORY FRAMEWORK	25
3.1. Law No. 77_03 on audiovisual communication (2005)	25
3.2. The High Authority for Audiovisual Communication (HACA)	26
3.3. The terms of reference of national public broadcasting companies	28
3.4. The Constitution of 2011	29
3.5. Limits on freedom of expression	29
4. DISTRIBUTION METHODS OF AUDIOVISUAL SERVICES	31
4.1. Number of households and of TV households	31
4.2. Terrestrial broadcasting	31
4.2.1. Terrestrial analogue television (TAT)	31
4.2.2. Terrestrial digital television (TDT)	31
4.3. Satellite television	34
4.4. Cable network television	35
4.5. ADSL network television (IPTV)	35
4.6. Personal mobile television (PMT)	37
4.7. 3G television	38
4.8. Internet television	38
4.9. Connected television	39
5. THE MOROCCAN TELEVISION LANDSCAPE	40
5.1. From monopoly to theoretical liberalization of ground airwaves	40
5.2. Main areas of new government audiovisual policy	41
5.3. The Public Pole	43
5.3.1. National Radio and Television Company (SNRT)	43
5.3.2. Consultancy and audiovisual production firm (SOREAD/ 2M)	44
5.3.3. Medi 1 TV	44
5.4. Public service vs State Institutions	47
5.4.1. Vision of public audiovisual service	47
5.4.2. Social and cultural diversity	48
5.5. Public television service	54
5.5.1. Television channels	54

5.5.2.	of SNRT achievements in 2010	57
5.5.3.	SOREAD 2M achievements in 2010	59
5.6.	Contribution of public broadcasting companies to domestic film production	60
5.7.	Financing of public broadcasting	61
5.8.	Reforming SNRT and SOREAD-2M terms of reference	66
5.9.	Proposals of the Finance Law of 2013	67
5.9.1.	Financial situation and assessment of SNRT achievements in 2011	67
5.9.2.	Achievements and financial condition of SOREAD-2M in 2011	68
5.9.3.	Fund allocation to promote the audiovisual landscape in 2013	69
5.10.	Independent audiovisual production in Morocco	69
5.10.1.	The Association of audiovisual companies (ASESA) :	69
5.10.2.	The Association of audiovisual designers and professionals (ACPAV)	74
6.	MEASURING TELEVISION AUDIENCE: MAROCMÉTRIE	76
6.1.	Features of Marocmétrique	76
6.2.	Capital Structure	76
6.3.	Mission of Marocmétrique	76
6.4.	Audience indicators	77
6.5.	Rules of dissemination	77
6.6.	Special programme of Wednesday 6th June 2012	77
6.7.	Annual/monthly panels for audience measurement	78
7.	INTERNET TV AND AUDIOVISUAL SERVICES ON DEMAND	86
7.1.	Channels broadcast via Internet	86
7.2.	Video sharing websites	87
7.3.	Moroccan broadcasters' branded channels on video-sharing channels	87
7.4.	Audience of online video sites in Morocco	88
8.	THE FILM MARKET	90
8.1.	Historical overview	90
8.2.	The Moroccan Cinematographic Center (CCM)	91
8.2.1.	CCM Mission	92
8.2.2.	Support Fund to domestic film production	93
8.3.	Film production in Morocco	99
8.3.1.	Hosting policy of foreign shooting	99
8.3.2.	List of foreign feature films shot in Morocco in 2012	99
8.3.3.	Production companies	102
8.3.4.	Data on production and coproduction	103
8.3.5.	Coproduction policy	103
8.3.6.	The film capital : Ouarzazate	105
8.4.	CCM assessment 2010 - 2011 - 2012	107
8.5.	Film distribution	110
8.5.1.	Distribution companies	110
8.5.2.	Distribution of foreign films in Morocco	110
8.6.	Film operating	111
8.6.1.	Cinemas	111
8.6.2.	Operating cinemas – 2012	112
8.6.3.	Collapse of attendance	113
8.6.4.	Issues of the operating business	114
8.6.5.	Support to operating	117
8.6.6.	Data on film success	118
8.7.	Distribution of Moroccan film abroad	124
8.8.	The physical video market	128
8.9.	Recent VoD beginnings and online piracy	128

8.10. National film events	129
8.10.1. Events organized with CCM	131
8.11. Participation of Moroccan cinema at international festivals	132
8.12. A new reform movement	132
8.12.1. Cinema Conference - October 2012	133
8.12.2. Cinema in 2013 Finance Law	135
8.12.3. Creation of two new committees.....	135
9. THE MOROCCAN COPYRIGHT BUREAU (BMDA).....	138
9.1. Monitoring and governance committee on copyright and related rights	139
10. TRAINING OF AUDIOVISUAL PROFESSIONALS	141

1. BASIC DATA

1.1. Institutions

Morocco – officially the Kingdom of Morocco – is a constitutional monarchy¹. Its first constitution was proclaimed in 1962 by King Hassan II. According to article one paragraph 1 of the new Constitution of 2011, *“Morocco is a constitutional, democratic, parliamentary and social monarchy. The constitutional system of the Kingdom is founded on the separation, balance and collaboration between the powers, as well as on civic and participatory democracy and the principles of good governance and the association of responsibility and accountability”*.

The King plays an important role in the political system. According to article 42, paragraph 1, of the new Constitution of 2011, *“the King is the Head of the State, its highest representative, the symbol of national unity, the guarantor of the sustainability and continuity of the State and the supreme arbitrator between its institutions and ensures compliance with the Constitution and the proper functioning of constitutional institutions. He protects democratic decisions and the rights and freedoms of citizens, men and women, and of communities and ensures compliance with the international commitments of the Kingdom. He is the guarantor of the independence of the Kingdom and its territorial integrity within its authentic borders”*.

The new Constitution of 2011 reinforced the role of Parliament and recognizes the role of the Opposition: *“Parliament is composed of two Houses, the House of Representatives and the House of Councilors. Their members derive their mandate from the Nation. Their right to vote is personal and may not be delegated. The Opposition is an essential component of both Houses. It contributes to the functions of legislation and control as specified especially herein”*. (Article 60 of the new Constitution)

Finally, the role of government is defined in article 88 paragraph 1 of the new Constitution: it consists of the Head of Government and of ministers, and is accountable to the King and to Parliament. *“After the members of government have been appointed by the King, the Head of Government addresses a joint session of both Houses of Parliament to introduce his programme”*.

¹ The official portal of the Kingdom of Morocco: <http://www.maroc.ma/>

1.2. Landmarks

Morocco has the privilege of being located at the crossroads of Europe, Africa and the Arab world¹.

The main indicators of the World Bank²:

	2002	2003	2010	2011
GDP per capita, PPP (USD current international)	2,850.0	3,060.0	4,570.0	4,880.0
Population, total (in millions)	29.5	29.8	32	32.3
GDP (USD current) (in millions)	40,416.1	49,822.7	90,802.9	100,221.0
GDP annual growth	3.3	6.3	3.7	4.5
Life expectancy at birth (years)	69.4	69.8	71.9	72.1

Source : World Bank

- Population: 32,614,001 according to the estimations of the High Commissioner for Planning (HCP), July 2012. ; 32.3 million in 2011 according to *2011 Report, State of world population*, UNPFA³
- Birth rate (CBR) is estimated at 18.3 % (2011/2012).
- In 2010, young people of less than 15 represented 27.4% of the whole population against 64.2% of people of working age (15 to 59) and 8.4% of seniors (60 and over)⁴.
- The ratio of the poor based on the national poverty line (% of the population): 1999: 6.3%, 2001:15.3%, 2007: 9%.
- Whereas the overall growth rate (TAG) of the whole population in Morocco is estimated at 10.3%, that of 2020 at 9.1% and of 2030 at 6.8%⁵.
- Currency/ exchange rate: Moroccan Dirham (MAD)¹, 100 MAD = 8.9604 EUR on 30th June 2012.

¹ Hassan ZAOUAL, « Le Maghreb, carrefour entre l'Afrique, la Méditerranée et l'Europe. Vers un monde pluriel ». *Foi et développement*, No. 317, pp. 1-4, October 2003, L. J. Lebreton Centre, Paris.

² http://search.worldbank.org/data?qterm=Morocco&language=EN&format=html& type_exact=Indicators

³ <http://foweb.unfpa.org/SWP2011/reports/FR-SWOP2011.pdf>

⁴ *Les Indicateurs sociaux au Maroc en 2010*, High Commissioner for Planning, Kingdom of Morocco, 2010, p. 14.

⁵ Rate (in p thousand) of birth, migration, natural and global growth of the whole population in Morocco 2004-2030, Projections of the population in Morocco per area of residence 2005-2030, p.15, Centre for demographic studies and research, High Commissioner for Planning, December 2007.

- Morocco is the fifth economic power in Africa. It is the second economic power in the Maghreb, after Algeria.

According to provisional estimations of the high Commissioner for Planning, GDP was 802.6 billion MAD (72 billion EUR) in 2011, an increase of 5 % compared to 2010.²

From the first quarter of 2011 to the same quarter of 2012, the unemployment rate went from 9.1% to 9.9%³.

- The official languages of Morocco are Arabic and, since 2011, Amazigh. French is still being used.

1.3. The economic context

In order to strengthen the position of the Kingdom in the Euro-Mediterranean and Arab regions and to consolidate its relations with the key drivers of global economic growth, the UE and the United States, Morocco initiated a movement of economic and political reforms with the support of the European Union in order to create the appropriate conditions for sustainable growth and unfailing social progress.

The Moroccan policy of opening the economy onto the regional and international environments is no longer a prospect or a distant horizon, but a daily practice and an everyday reality.

Currently, Morocco enjoys solid reputation among several agencies and international public institutions because of the efforts achieved in the field of governance, political freedoms and macroeconomic consolidation. To mention only two examples: in 2006, the World Bank and the International Finance Corporation ranked Morocco first in the MENA region. Their confidence facilitates Morocco's rise in the indicator of economic, political and social reforms carried out around the world. Morocco is currently making its way towards openness and self-assertion. Hence, its economic attractiveness is enhanced in terms of FDIs and of the confidence it enjoys at present in the international community and among financial institutions.

According to official statistics, improving growth and employment has resulted in an increase of the average standard of living of Moroccan citizens⁴.

GDP per capita moved from 15,800 MAD in 2001 to 20,400 MAD in 2006. At the same time, the Human Development Index grew by 1.4% and, therefore poverty is lowered to 14.2% in 2004, according to the latest population census carried out by the High Commissioner for Planning⁵.

¹ The common abbreviation in Morocco for the dirham is MDH. We are using here the ISO code: MAD.

² HCP, « Les comptes nationaux provisoires de 2011 » (Provisional 2011 national accounts), http://www.hcp.ma/Les-Comptes-nationaux-provisoires-de-2011_a1022.html

³ Briefing note of the High Commissioner for Planning on the state of the labor market in the first quarter of 2012; P.3. National survey on labor, High Commissioner for Planning (Statistics Department), <http://www.hcp.ma>

⁴ It is unlikely that this is a detailed economic analysis of the economic situation in Morocco. Among the official sources we may mention the reports of Bank Al Maghrib (<http://www.bkam.ma>), of the Ministry of Economy and Finances (<http://www.finances.gov.ma>), of the High Commissioner for Planning (<http://www.hcp.ma/>).

⁵ Hassan ZAOUAL, *Ombres et lumières sur l'économie du Maroc, Trajectoire et perspectives*, p. 4, 2009, <http://www.tanmia.ma/fr/thematiques/developpement-economique/economie-sociale-solidaire/1020-ombres-et->

Deeper economic integration to European Union economy was strongly reasserted since the beginning of Mohamed VI reign as it is believed to support national effort to modernize institutions and restructure economy.

The new trend aims at accelerating Morocco-EU partnership and supporting the endogenous energy in Morocco towards consecrating democracy, promoting human rights, modernizing economy and promoting social cohesiveness and human development.

Economic growth maintained an upward trend during the period 2004-2008 with an average of 4.8% per year then 3.8% between 1999 and 2003. This improvement which has affected most sectors is due to the consolidation of domestic demand and to the increasing contribution of overall productivity to growth¹.

The wind of democracy which has blown over the Middle East and North Africa region (MENA) in 2011 did not spare Morocco even if the events there have kept a relatively peaceful tone. The Kingdom exhibited the same signs at the beginning of the Arab Spring but it had already initiated a reform process.

Since Mohamed VI acceded the throne in 1999 all the governments which have ruled the country contributed to a substantial political, economic and social transformation without succeeding to put an end to endemic corruption, to widespread poverty and to a condition by which Morocco has the leading position in the Arab world, the gap between the rich and the poor.

The protest movement which started in 2011, and was called “the movement of 20th February” in reference to the massive riots on that day, claimed change, fighting corruption and a more inclusive development process. Well organized demonstrations took place at regular intervals in the whole country throughout 2011, with only few outbreaks of violence. Mohamed VI proposed a set of political reforms which have won the support of a majority of the population (98.5%) during the constitutional referendum of 1st July 2011, with a participation rate of 73%².

[lumières-sur-leconomie-du-maroc](#). This summary of Moroccan economy is based on a number of works carried out within the Research Group on Local Economies, GREL, Research Laboratory on Industry and Innovation of the University of Littoral Côte d'Opale in France. These studies were the subject of international publications and doctoral dissertations defended by around fifteen young Moroccans who are currently Assistant Professors and researchers in Morocco. It also draws on national and international official reports on Moroccan economy, society and environment.

¹ *L'économie marocaine : performances macro-économique et politiques de modernisation sectorielle*, High Commissioner for Planning, National Documentation Centre, Kingdom of Morocco, December 2010, <http://www.abhatoo.net.ma/index.php/Maalama-Textuelle/>

² <http://www.banquemondiale.org/fr/country/morocco/overview>

1.4. Membership of Morocco and its public audiovisual bodies in active international organizations in the audiovisual sector

Morocco is a member of the United Nations and of the various UN agencies involved in the audiovisual sector, especially UNESCO, WIPO (World Intellectual Property Organization), WTO. The Kingdom is also a member of ITU (United Nations specialized institution for information and communication technologies). It is also a member of the Arab League, ALESCO and the Islamic Organization for Education, Sciences and Culture (ISESCO), and of the International Organization of La Francophonie.

The High Authority for Audiovisual Communication (HACA) is a member of:

- REFARM : Francophone network of media regulators
- RIRM : Network of Mediterranean regulatory authorities
- RIARC : Network of African regulatory authorities of communication
- URI: Radio union of Islamic countries

The public radio and television broadcaster, (Société Nationale de Radiodiffusion et de Télévision; SNRT), is a member of seven international organizations in the audiovisual field. They are:

- ASBU : Arab States Broadcasting Union
- EBU - UER : European Broadcasting Union
- COPEAM : Permanent Conference of the Mediterranean Audiovisual Operators
- The International council of French-speaking radio and television (Conseil International des Radios-Télévisions d'Expression Française)
- URTI : International radio and television union
- CMCA : Mediterranean Centre for Audiovisual Communication
- OIF: International Organization of la Francophonie (Francophone fund for south audio production).

1.5. Links with European institutions

1.5.1. *The European Union*¹

As early as 1963, Morocco requested opening negotiations with the European Community for the purpose of a trade agreement concluded in 1969. This cooperation later progressed until a new agreement was concluded in 1976 including trade provisions and a financial contribution in the form of grants to support the socio-economic development of the Kingdom.

Along with this Agreement, four financial agreements were signed in the period 1976-1996 supplemented by loans from the European Investment Bank. In the period following the financial agreements, MEDA I programme (1996-99), which tripled assistance to Morocco in comparison to the financial agreements, ensured support to the economic transition and socio-economic balance of the country. MEDA II, with projects still running to the present, significantly increased the amount of money allocated to Morocco. Since 1st January 2007, ENPI (European Neighbourhood and Partnership Instrument) takes over with a budget allocation for the period 2007-2010 of 654 million Euros, making Morocco the first recipient of European funds in the region.

At the regional level, the Barcelona Conference in November 1995 gathered the 15 countries of the European Union and the 12 Mediterranean partners, which resulted in the Barcelona Declaration, an ambitious programme of dialogue, exchange and cooperation to ensure peace, stability and prosperity in the region. This unprecedented political commitment includes “politics and security”, “economic and financial” and “social, cultural and human” aspects. Partnership is established at a bilateral level through an association agreement between the Mediterranean partner and the European Union.

Morocco, which holds a strategic position in the Euro-Mediterranean partnership, signed this Association Agreement in February 1996. After its ratification by all the Parliaments of the European Union member states, the Agreement came into force in March 2000. Its main objectives are:

- to strengthen political dialogue,
- to set the necessary conditions for progressive trade liberalization for goods, services and capitals,
- to promote balanced social and economic relations between the parties,
- to support South-South integration initiatives
- and to promote cooperation in the economic, social, cultural and financial fields.

Compliance with the values of democracy and human rights is also an essential element of the Association Agreements.

Neighbourhood Policy: a new framework for the future

In 2003, the European Union launched the neighbourhood policy to complement, clarify and reinforce the Euro-Mediterranean partnership.

¹ According to the page “European Union and Morocco” of the European Union Delegation in Morocco, visited on 3rd November 2012. http://eeas.europa.eu/delegations/morocco/eu_morocco/political_relations/index_fr.htm. Refer also to the “Morocco” page of DG EuropeAid http://ec.europa.eu/europeaid/where/neighbourhood/country-cooperation/morocco/morocco_fr.htm

Through the European neighbourhood policy, the EU tries to avoid new dividing lines between the extended EU and its eastern neighbours and those on southern and eastern Mediterranean shores. ENP goes beyond existing relations to offer an enhanced political relationship and economic integration reinforcing stability, security and general well-being.

This relationship is founded on a mutual commitment to promote common values such as:

- the rule of law,
- good governance,
- respect for human rights,
- promoting good neighbourly relations,
- market economy
- sustainable development

These ideas are embodied in separate Action Plans, jointly established by the EU and each of the partner countries, taking into account the specific nature of each one of them. These action plans set out an agenda of economic and political reforms with short and medium-term priorities.

At the meeting of the EU-Morocco Association Board on 23rd July 2007, Morocco and the European Union decided to launch a discussion process to strengthen bilateral relations. Concrete proposals aiming at giving substance to the advanced status, which Morocco is seeking in its relations with the EU, were then discussed. On 13th October 2008, during the 7th board meeting of the association at Luxembourg, the advanced status, the first among southern Mediterranean countries, was granted to Morocco, marking a new phase of privileged relations. A joint report including an ambitious road map was adopted. The advanced status, of which the road map was adopted on 13th October 2008, aims at transferring strengthened political dialogue and social and economic cooperation to the parliamentary, security and judicial sectors and to others such as agriculture, energy, and environment. It also aims at progressively integrating Morocco in the common domestic market and at achieving legislative and regulatory convergence.

The document reinforces partnership while specifying new ambitions: stronger political relations, integration in the domestic market based on statutory convergence, sector-based cooperation and human dimension. Morocco has thus become the first south Mediterranean country to acquire an advanced status in its relations with the European Union.

Participation at the Euromed Audiovisual III Programme

In terms of audiovisual cooperation with the European Union, Morocco was a partner in both earlier programmes of Euromed Audiovisual.¹

Morocco took part in the Euro-Mediterranean Ministerial Conference for Culture which took place in May 2008 in Athens and endorsed the "Development Strategy for Euro-Mediterranean Audiovisual Cooperation"² which was developed in Euromed audiovisual II and is presently a partner in Euromed Audiovisual III (2011-2013).

Access to MEDIA MUNDUS

¹ Euromed Audiovisual III Program (2011-2013), <http://www.euromedaudiovisuel.net/p.aspx?t=general&mid=85&l=fr>

² <http://www.euromedaudiovisuel.net/general.aspx?treeID=9243&lang=fr&documentID=9244>

MEDIA MUNDUS programme of the European Union was adopted by ruling 1041/2009/EC of the EUROPEAN PARLIAMENT and the COUNCIL on 21st October 2009 establishing an audiovisual cooperation programme with third country professionals (MEDIA Mundus)¹. With a budget of 15 million Euros for a three-year period (2011 – 2013), the new programme aims at reinforcing cultural cooperation and trade relations between European and third country film industries.

It follows MEDIA international preparatory programme. Its implementation meets a strong demand of the various players in the audiovisual field to support and strengthen cooperation between European and third countries.

MEDIA Mundus supports projects in the following areas:

- Training: to strengthen competencies of European and third party professionals.
- Market access: to contribute to financing projects which aim at promoting access of audiovisual works to international markets. These projects are concerned with the development stages and/or preproduction (for example international coproduction markets) and with downstream activities (including events to promote the international sale of works).
- Support to distribution and circulation: to promote distribution, advertising, screening and circulation of European productions in third country markets in optimal conditions, as well as third country productions in Europe.
- Cross activities: to contribute to financing cross projects involved in priority activities²; for example training followed by promotional events during coproduction meetings.

In order to be funded under MEDIA Mundus, projects must be proposed and implemented jointly by European professionals and third country professionals and must promote the creation of networks internationally.

Under this programme, Morocco is considered third country and Moroccan projects introduced in the framework of the partnership with third countries, are eligible.

The future « Creative Europe » programme

On 25th November 2011 the European Commission adopted its proposal for a Regulation of the European Parliament and the Council with the Creative Europe Programme.³ The proposal was the subject of a preliminary “global approach” adopted by the Ministers’ Council on 10th May 2012. It is being examined at the European Parliament⁴.

Article 16 of the Commission’s proposal provides for the accessibility to future country programme under the European Neighbourhood Policy (which includes Morocco), according to the arrangements defined with these countries in the framework agreements providing for their participation in programmes of the Union. This participation would be subject to meeting the requirements, (including, for MEDIA, those established by Directive 2010/13/EU of the European Parliament and Council of 10th March 2010 aiming at coordinating a few legal,

¹ <http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=OJ:L:2009:288:0010:0017:FR:PDF>

² <http://register.consilium.europa.eu/pdf/en/12/st09/st09097.en12.pdf>

³ http://ec.europa.eu/culture/creative-europe/documents/proposal-regulation_fr.pdf

⁴ <http://www.europarl.europa.eu/committees/fr/opinions.html?linkedDocument=true&ufolderComCode=&ufolderLegId=&ufolderId=&urefProcYear=2011&urefProcNum=0370&urefProcCode=COD;>

statutory and administrative provisions of member states on service delivery of audiovisual media), and to paying additional appropriations.

In March 2013, the ruling on Creative Europe Programme is at the stage of tripartite negotiations between the Ministers' Council, the European Parliament and the European Commission. It is due to be adopted in June 2013.

1.5.2. *The Council of Europe*

Morocco has also established links with the Council of Europe, especially under its neighbourhood policy set up in the context of the Arab Spring of 2011.

Links between Morocco and the Council of Europe took place gradually, following a seminar on "Cooperation prospects between Morocco and the Council of Europe" on 22nd, 23rd February 2010 at the Ministry of Foreign Affairs and Cooperation in Rabat. The seminar, which was held for the first time in a country of Southern neighbourhood, gathered state officials, parliamentarians and political stakeholders as well as representatives of civil society from both shores¹. The meeting allowed promoting cooperation at a higher level through a gradual and structured endorsement of the Agreements and Conventions of the Council of Europe.

Subsequently, in February 2012, in the context of the neighbourhood policy, extensive consultations occurred between the Council of Europe and Moroccan authorities in order to set cooperation priorities. The discussions resulted in the approval by the Ministers' committee and Moroccan authorities of the framework document "Cooperation priorities for Morocco, 2012-2014" which includes a section on cooperation in the audiovisual sector.

The identified cooperation priorities are implemented especially through cooperation programmes with the EU as well as voluntary contributions. The EU/ CoE cooperation south of the Mediterranean is highly significant and materialized in a joint programme, "Reinforcing democratic reform among southern neighbours", of 14.8 million Euros, funded by the European Union and implemented by the Council of Europe in the period 2012-2014, for the countries of the region, mainly Morocco and Tunisia. The Moroccan Parliament obtained the status of "partner for democracy" on 21st June 2011 at Strasbourg, to the Parliamentary Assembly of the Council of Europe. The Moroccan parliament is the first to be granted this status, created for non-member states of neighbouring regions willing to benefit from the experience of the Assembly in the consolidation of democratic practice. The status of "partner for democracy" allows Moroccan parliamentarians to sit in the Parliamentary Assembly of the Council of Europe, without the right to vote, and to take part in the works at plenary and committee meetings of the Assembly to discuss common issues.

Morocco joined six Agreements, partial, extended-partial and open-extended to non-member countries of the Council of Europe.

The nature of the links is defined in a *document 2012-2014 Priorities for Morocco in the framework of neighbourhood cooperation* prepared by the Secretariat of the Council of Europe

¹ "Morocco and the Council of Europe" website of the Moroccan Ministry of Foreign Affairs and Cooperation, <http://www.diplomatie.ma/Politique%C3%A9trang%C3%A8re/LeMarocetleConseildeleurope/tabid/215/language/en-US/Default.aspx>

and published on 2nd April 2012.¹ The document includes a section on cooperation in the fields of audiovisual and film production and of sports.

Cooperation in the fields of audiovisual and film production and of sports

The Council of Europe has a number of conventions and tools in the field of audiovisual communication, of film promotion, education, culture and sports that could help support Morocco. The programme includes a regional dimension aiming at promoting cooperation between the countries of the region.

Audiovisual communication

In the field of audiovisual communication, much progress has been achieved since the repeal of State monopoly in 2002 and the enactment of Law No. 77-03 in 2005 reflecting stronger endorsement of international standards and of those of the Council of Europe to ensure more freedom of expression, objectivity of information and pluralism of media and its contents, as well as cultural and linguistic diversity.

A movement of legal and institutional integration complements the process and will most likely, in terms of the advanced status in the European Union, consist of the gradual inclusion of the Kingdom in some of the legal instruments of the Council of Europe in the field of audiovisual communication.

In addition to the multiple challenges the sector faces, in the field of technological convergence and economic development especially, significant progress was achieved in the area of regulation, leading to concrete results recorded in documents that should be widely distributed, but generating new ways of thinking requiring that further efforts be made on the analytical level.

General objective: strengthen freedom of expression, media independence and professional ethics and promote statutory convergence of the Moroccan audiovisual sector with the instruments of the Council of Europe.

Expected results:

- 1. Highlighting the issue of gender equality in Moroccan audiovisual media, mainly through translating the "Summary Report on Women's image" by the High Authority of Audiovisual Communication (HACA) to English, French and Spanish, in order to disseminate and discuss it in the side events of the International Mediterranean Film Festival of Tetouan ;*
- 2. Promoting domestic and external pluralism of Moroccan audiovisual media through an international conference that would "Assess the management of audiovisual pluralism during the referendum and legislative campaigns of 2011 in Morocco" in preparation of communal elections on this issue, planned for 2013;*
- 3. Strengthening cultural and linguistic diversity in Moroccan audiovisual media through a theme-based report, with the assistance of the Council of Europe, the Ministry of Culture and Moroccan public institutions working in the field of culture and of HACA, involving a large consultation with of key players;*

¹<https://wcd.coe.int/ViewDoc.jsp?Ref=DGProg/Inf%282011%294&Language=lanFrench&Ver=rev&Site=COE&BackColorInternet=DBDCF2&BackColorIntranet=FDC864&BackColorLogged=FDC864>

4. Supporting a process of including the Kingdom of Morocco in the European Audiovisual Observatory initiating to this end preliminary steps for technical coordination through HACA, conditions laid down by Resolution CM/Res (92) 70 as revised by Resolution Res (2007)7 of 21st September 2000, so that Morocco may transmit and access reliable, timely and relevant information in the various broadcasting sectors, which ensure following the significant developments in this strategic field¹.

Partners : Ministry of Youth and Sports, Ministry of Communication, Ministry of Culture, HACA, media and civil society, youth organizations, educators, Moroccan public institutions working in the field of culture.

Film production

General objective: establish cooperation with Eurimages and promote tools for regional cooperation in the field of film industry.

Partners: Ministry of Communication, Ministry of Culture, media and civil society, Moroccan public institutions working in the field of culture.

1.5.3. OSCE

Morocco has the status of “Mediterranean partner for cooperation” in the Organization for Security and Cooperation in Europe (OSCE).² In May 2011, Human Rights Director of OSCE offered the organization’s cooperation in order to support human rights policy especially regarding freedom of the media.³

¹ Morocco’s request to join the European Audiovisual Observatory, partial-extended agreement of the Council of Europe, was formulated by the Moroccan Minister of Foreign Affairs in 2010. On 8th November 2012, the Observatory Executive Council advised in favour of the membership application. It must now be confirmed by the Moroccan authorities and approved by the Ministers’ Committee of the Council of Europe.

² <http://www.osce.org/who/84>

³ “OSCE human rights chief offers support for reforms in Morocco”, OSCE Press Release, 26 May 2011, <http://www.osce.org/odihr/78196>

2. DEVELOPMENT OF TELECOMMUNICATION INFRASTRUCTURE

2.1. A policy aiming at developing telecommunication infrastructure

Since the end of the 1990's, Moroccan authorities have set up a policy aiming at developing telecommunication infrastructure. It is useful to introduce it here insofar as it affects significantly the distribution progress of audiovisual services (television and audiovisual services on demand).

The National Agency of Telecommunications Regulation (ANRT)¹ is the public body in charge of controlling and regulating the telecommunications sector. The agency is connected to the Office of the Head of Government and has legal capacity and financial autonomy.

ANRT was created in February 1998, pursuant to Law No. 24-96 regarding Postal and Telecommunication services, which laid down the general outlines reorganizing the sector. Under Law No. 24-96 as amended and supplemented by Law No. 55-01 of 2004², the agency works to drive growth in the sector along with establishing a legal and economic environment conducive to its development.

ANRT implements and sustains the conditions of a fair and sound competition on telecom markets. ANRT contributes by ensuring good market conditions, reducing user bills and providing quality access to telecommunication services.

In order to attract global investors, the Moroccan government carried out reforms based on liberalization and privatization in the areas of finance and telecommunications while investing massively in development and necessary infrastructure development. As a result, telecommunications (telephone, internet) has experienced a rapid unprecedented growth.

The transition from a highly administered economy to an economy based on private initiative is the key to the success of the sector. As a result, Morocco emerged as the regional centre for relocation for French and Spanish companies³. According to a McKinsey study, *"Off shoring and call centers could add 0.3 percent annually to GDP growth from 2003 to 2018, thus reducing the international trade deficit by around 35 percent. The off shoring is expected within the same period to create 100,000 new jobs"*⁴. In 2012 Morocco was elected best off shoring destination by the European Off shoring Association (EOA). The Kingdom has been able to outperform five selected destinations for this prestigious award, namely Romania, Serbia, Slovakia, South Africa and Egypt on a total of 15 candidate countries⁵.

¹ <http://www.anrt.ma/>

² Four laws enacted between 1997 and 2007 govern to the present the telecommunication sector in the Kingdom of Morocco: Law No. 24-96(1997); Law No. 79-99 (2001); Law No. 55-01(2004); Law No. 29-06(2007). The purpose of these laws is to define the legal framework for the new environment of postal and telecommunication services, including the Telecommunication networks which could be operated by individuals with a licence granted by deliberated decree in accordance with article 66 of the constitution. The assembled four laws are reproduced in this document: "Law No. 24-96 consolidated, regarding the post and telecommunications as amended and supplemented": <http://www.anrt.net.ma>.

³ *Mapping Digital Media: Morocco*, A report by the Open Society Foundations, by Dr. Bouziane Zaid & Dr. Mohamed Ibahrine, May 2011, p.9. <http://www.soros.org/sites/default/files/mapping-digital-media-morocco-20110826.pdf>

⁴ McKinsey & Company, "Morocco's Off shoring Advantage", http://www.mckinseyquarterly.com/Moroccos_off_shoring_advantage_1683

⁵ "Digital Morocco 2013 strategy: a preliminary positive assessment", the words of Abdelkader Aâmara, Minister of Commerce, Industry and new technologies, published on 14 August 2012 - *Le Matin*, Cf: http://www.lematin.ma/journal/NTI_Strategie-de-Maroc-Numeric-2013--un-premier-bilan-globalement-positif/170317.html

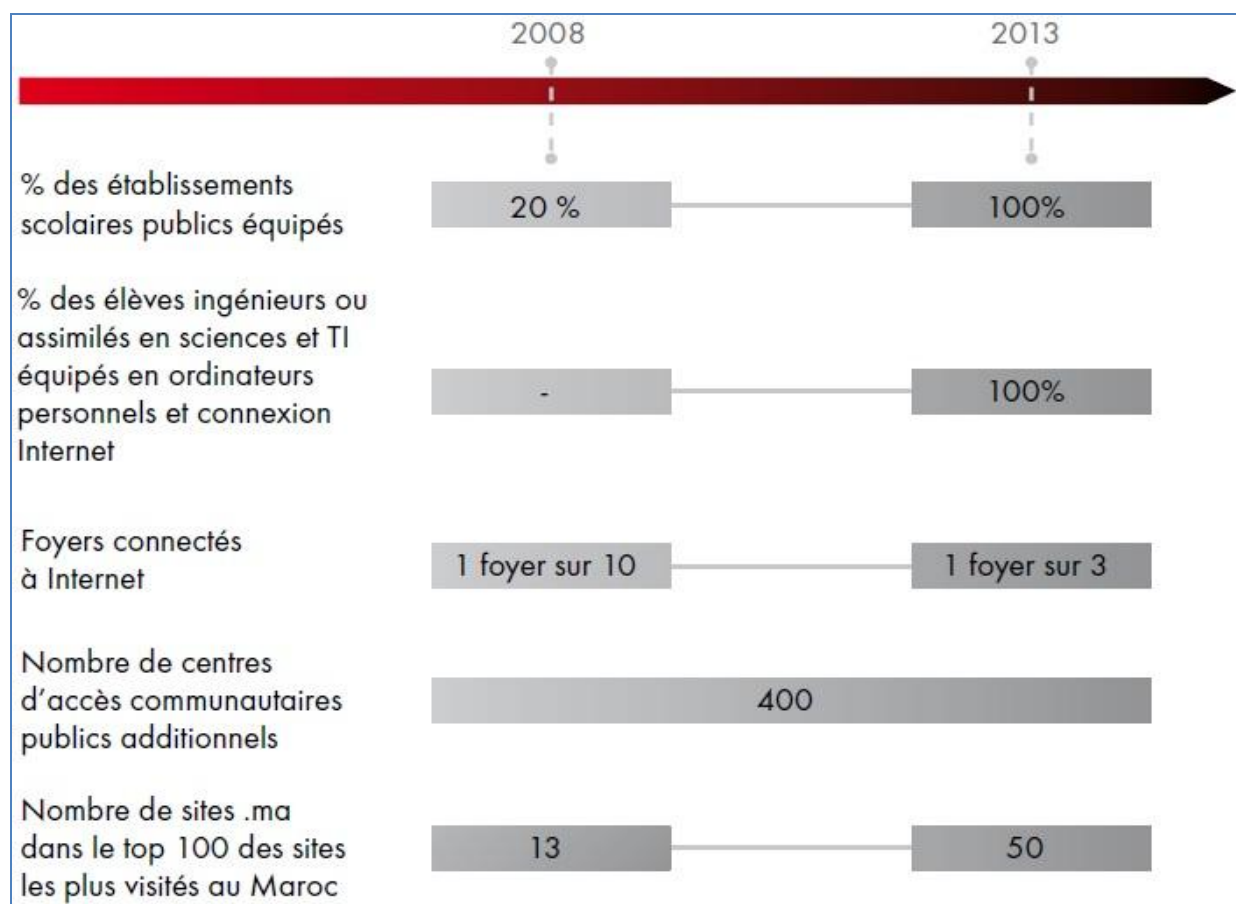
In addition to the three main telephone operators which are Maroc Telecom (“Itissalat Al Maghrib” or “IAM” in the official wording)¹, Medi Telecom and Wana, Morocco has twelve satellite operators, providing various services on the telecommunication market.

It is worth noting that Maroc Telecom currently owns shares in the capital of several African companies of national scale: 50% in Mauritel, 51% in Onatel, incumbent operator of Burkina Faso, 51% of Gabon Telecom. This portfolio expansion of the national operator confirms the high status of Morocco as African leader in a field which has acquired fundamental importance in the progress of contemporary global economy.

In October 2009, in order to contribute at positioning Morocco among the emerging countries with an activity in Information and Communication Technologies, the Ministry of Industry, Commerce and New Technologies launched “digital Morocco 2013” strategy, a programme with a 5.2 billion MAD budget to develop the Kingdom’s information society and digital economy. It focuses on developing four areas: broadband internet, e-government, domestic industry of information technologies and computer technology in small and medium enterprises (SMEs).

The following chart introduces the objectives of “digital Morocco 2013” strategy which aims, among other things, to facilitate citizen access to Broadband Internet and promote access to exchange and knowledge.

¹ Maroc Telecom is the leading telecom operator, created in 1999 during the dissolution of the National Office of Postal and Telecommunication services. In February 2001, the French group Vivendi (which controls SFR and Canal Plus) acquired 35 % of the capital. Subsequently, Vivendi’s share rose to 53 %, leaving the Kingdom of Morocco with only 30 %. In October 2012, The Vivendi Group, which intends to leave the telecommunication sector, expresses its intention to sell its share in Maroc Telecom. Qatar Telecom, Etisalat, Saudi Telecom and the South African company, MTN are mentioned by the potential buyers of this share. The Economic Times, 24th October 2012. http://articles.economictimes.indiatimes.com/2012-10-24/news/34708110_1_vivendi-shares-maroc-telecom-gvt



Source: *Digital Morocco 2013, National Strategy for the Information Society and Digital Economy*, <http://www.egov.ma/Documents/Maroc%20Numeric%202013.pdf>

For this reason, widespread access to information technologies is in Morocco among the major priorities. The National Agency for Telecommunication Regulation (ANRT) plays an important role in steering several projects and programmes indicating the widespread nature of ICT access, such as: GENIE, PACTE, INJAZ, NAFID@, E-SUP, and Community Access Centers (CAC) to ICT's.

In its report, *Measuring the Information Society 2011*, ITU¹ indicates that since 2008, Morocco has made an increase of 300% in its broadband networks. The adoption of broadband telephone enabled the Kingdom to increase the rate of internet penetration reaching 50%, marking an increase from 2.3% in 2009 to 10% in 2011. Conversely, the progress of the landline segment does not indicate the same growth in spite of some recently achieved progress.

¹ International Telecommunication Union (ITU), *Measuring the Information Society 2011: The ICT development Index 2011* accessible at <http://www.itu.int/net/pressoffice/backgrounders/general/pdf/5.pdf>

2.2. Data on telecommunication infrastructure

The development of telecommunication infrastructure is regularly assessed by ANRT which publishes quarterly indicators through its Observatories, accessible online.¹

ICT Sector: Infrastructure indicators

Indicator	Measuring unit	Q2 2011	Q3 2011	Q4 2011	Q1 2012	Q2 2012	Rate of quarterly growth	Rate of annual growth
Mobile subscriptions	In millions	34 975	36 150	36 554	36 239	37 422	3.27	
Rate of penetration of mobile telephony	%	108.66	112.31	113.57	112.59	115.07		
Total number* Fixed telephone	In millions	3.646	3.523	3.566	3.534	3.444	-2.55%	
Rate of penetration Fixed telephone	%	11.33	10.95	11.08	10.98	10.59		
Internet users(estimation)	In millions	2.345	2.881	3.182	3.444	3.759	9.13	60.27
Rate of internet penetration	%	7.29	8.95	9.89	10.7	11.56		
Broadband subscriptions (ADSL)	In thousands	527.016	550.508	589.678	610.949	629.049	2.96	19.36
Broadband Internet users (3G)	%	77.45	80.83	81.41	83.28		10.46	72.2
International internet connection	Gigabytes per second							

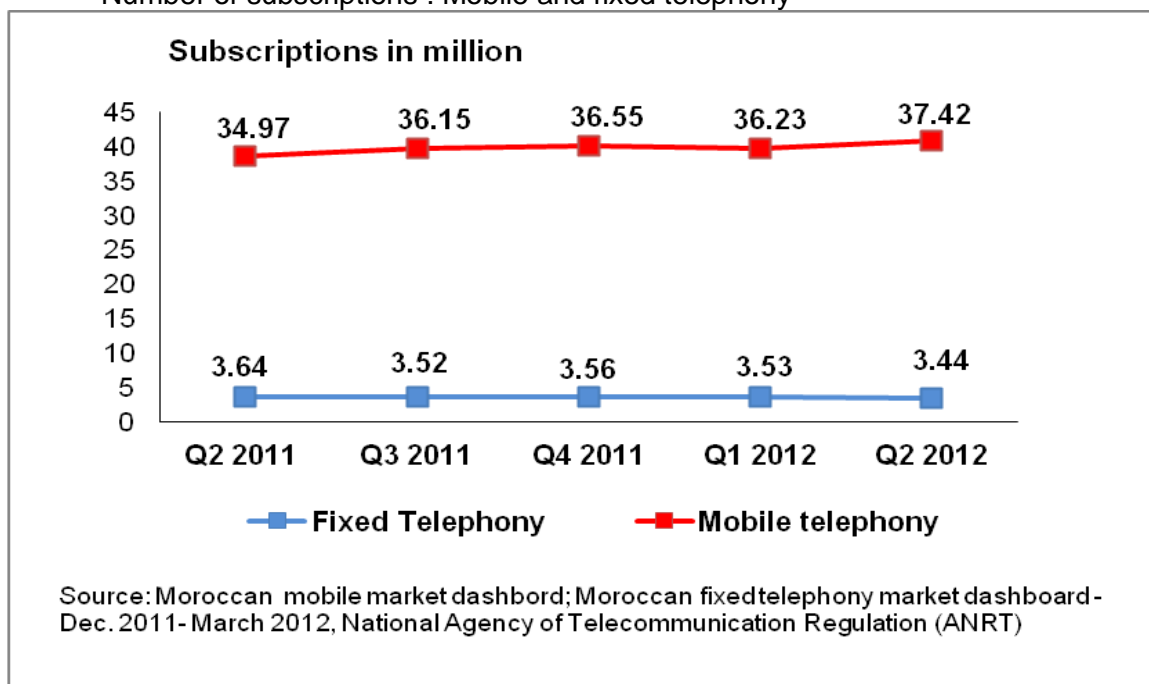
* This figure includes residential and professional customers as well as payphones using the fixed network.

*Growth in % in quarter N : (The total number at the end of quarter N – The total number at the end of quarter N-1) / Number at the end of the quarter N-1.

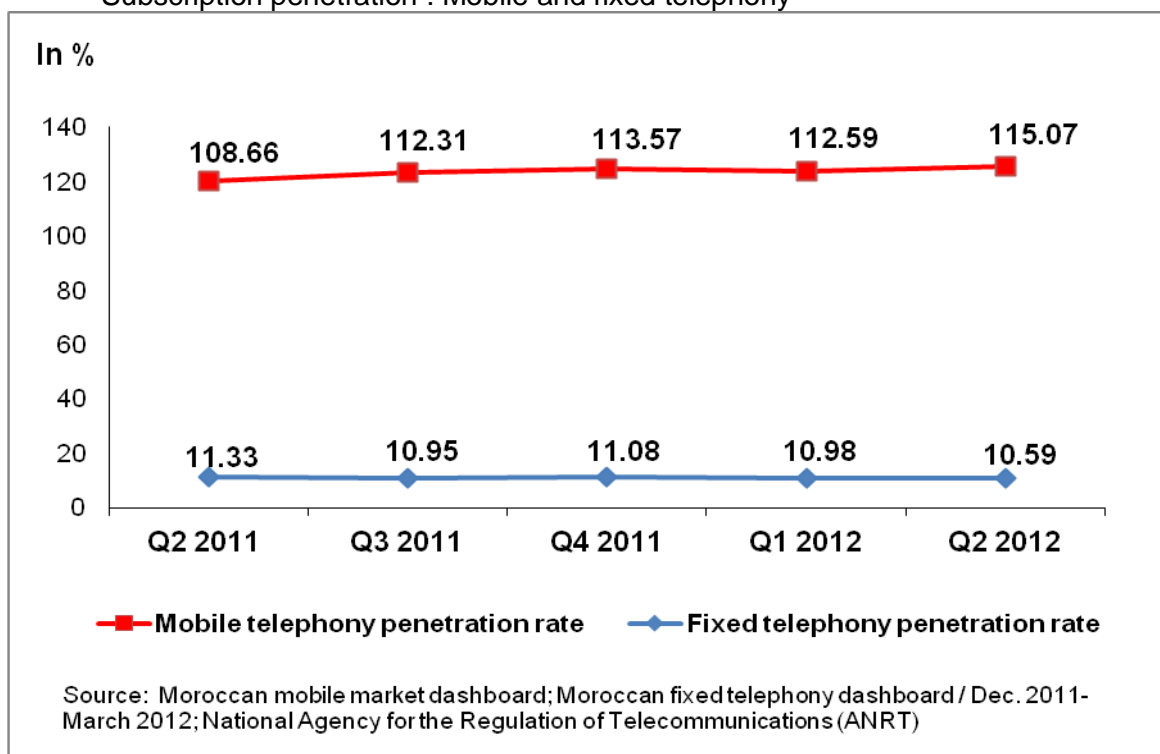
Source: Moroccan internet market dashboard: June 2011- September- December 2011- March 2012- June 2012; National Agency for the Regulation of Telecommunications (ANRT)

¹ <http://www.anrt.ma/indicateurs/observatoires/analyse-des-marches>

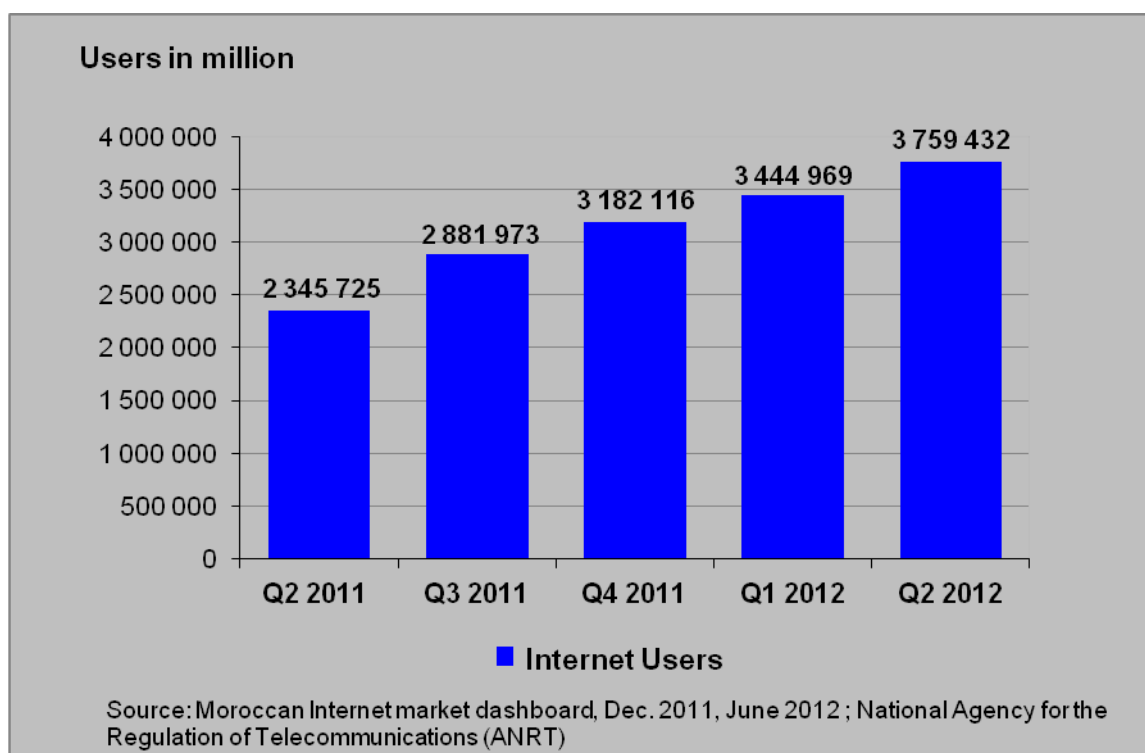
- Number of subscriptions : Mobile and fixed telephony



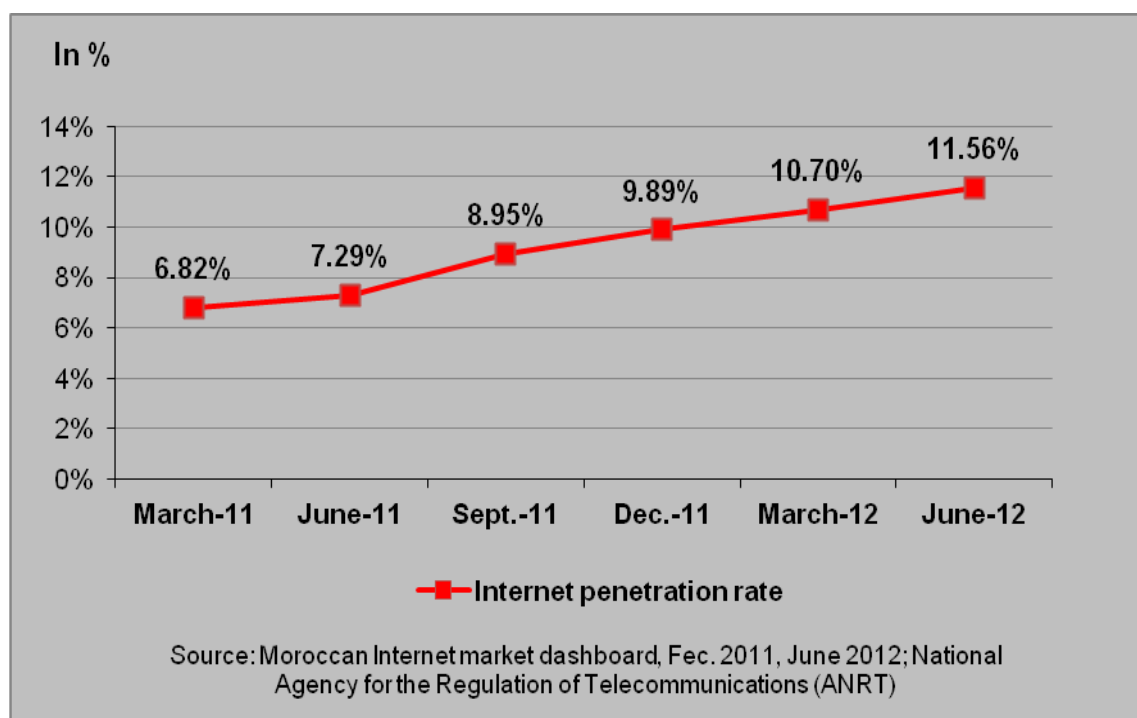
- Subscription penetration : Mobile and fixed telephony



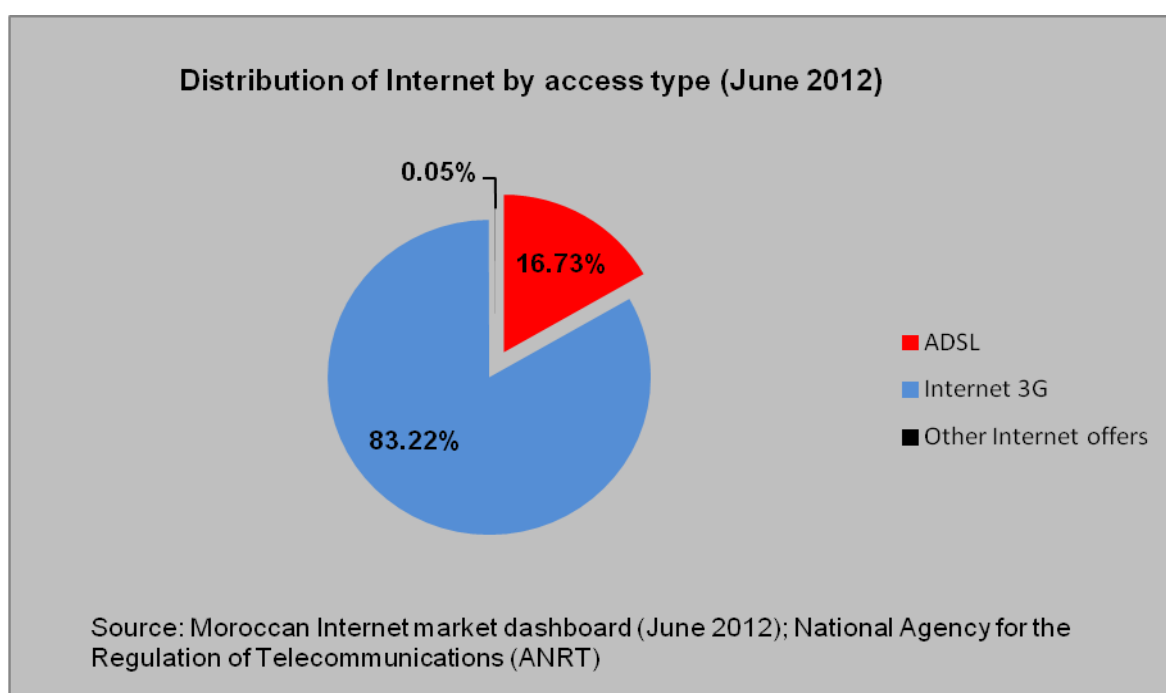
- Number of internet users



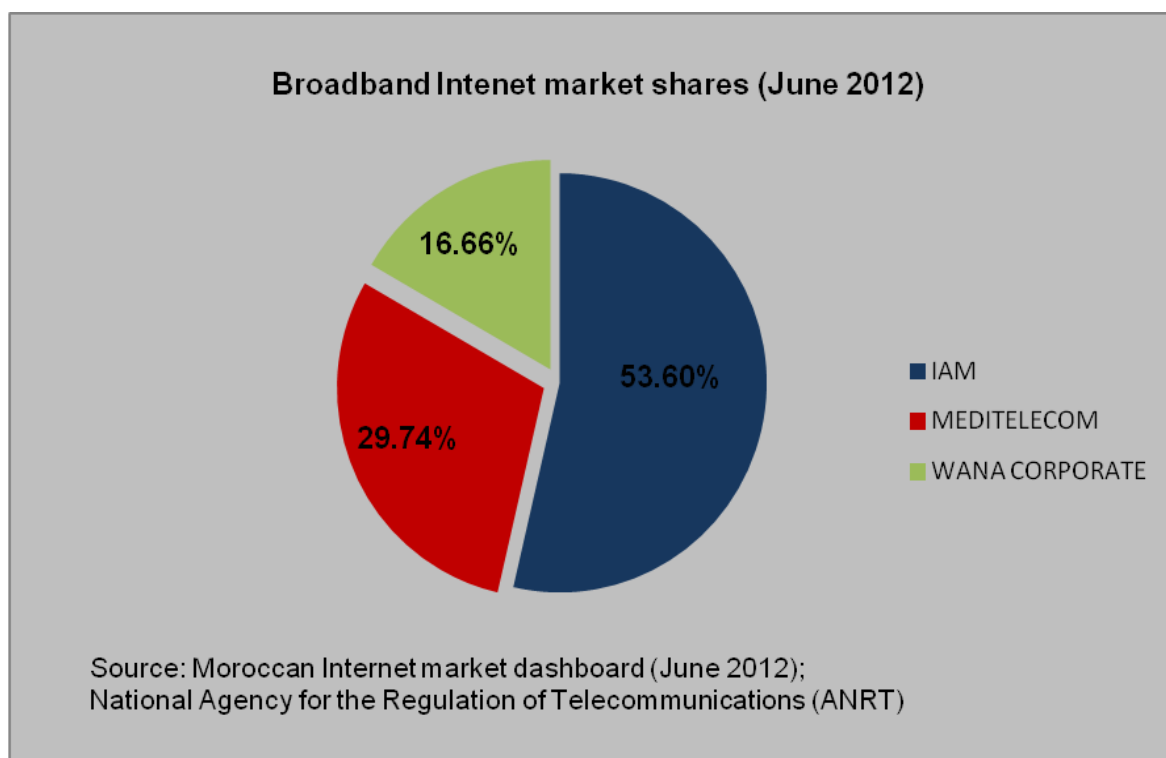
- Internet penetration quarter progress



- Distribution of internet by access type (June 2012)



- Broadband Internet market shares



3. TELEVISION REGULATORY FRAMEWORK¹

3.1. Law No. 77_03 on audiovisual communication (2005)

Law No. 77-03 on audiovisual communication is a significant milestone in the process of establishing a legal framework to liberalize the sector. It began when Dahir No. 1-02-212 of 22nd *Jumada II* 1423 (31st August 2002) on creating the High Authority for Audiovisual Communication, and Decree-law No. 2-02-663 of 2nd *Rejeb* 1423 (10th September 2002) on ending State monopoly in television broadcasting, were enacted. They opened the way for free enterprise in audiovisual communication².

Reform in the audiovisual communication sector is part of this commitment to consecrate the values of freedom and promote democracy and pluralism in the country.

Law No. 77-03 is viewed as an extension of all the laws in force in the information sector. It establishes an environment of diversification and offers prospects to private operators, attracting them to operate audiovisual communication networks in an organized and transparent framework.

The Dahir provides HACA, within the powers and responsibilities which have appointed it, as well as to the various relevant public authorities, the necessary tools to regulate and support the sector while designing mechanisms, procedures and measures to implement³.

¹This chapter is only intended to provide basic information on television regulatory framework. It does not claim to be providing an elaborate legal analysis. It was supervised however by Mr. Michel Gyory, the expert in charge of legal issues at Euromed Audiovisual III.

² After Decree-law No. 2-02-663 of 10th September 2002 ending State audiovisual monopoly and Dahir No.1-02-212 of 31st August 2002 creating the High Authority for Audiovisual Communication (HACA) were enacted, the Ministry of Communication developed Law No. 77-03 on audiovisual communication which was approved by the Council of Government on 4 December 2003, then in the Council of Ministers on 3 June 2004. It was enacted on 7 January 2005 by Dahir No. 1-04-257 accessible on : <http://www.haca.ma/pdf/commaudiovisuelle.pdf>

³ Ibid., p.4



3.2. The High Authority for Audiovisual Communication (HACA)¹

- Objective and role

Decree-law No. 2-02-663 of 2nd Rejeb 1423 (10th September 2002) puts an end to State monopoly in the field of radio broadcasting and television².

Under this decree-law, the High Authority for audiovisual communication was created by Dahir No.1-02-212 of 22nd Joumada II 1423 (31st August 2002). Finally, reform of the audiovisual landscape materialized when Parliament unanimously adopted Law No. 77-03 on audiovisual communication on 25th November 2004³.

The High Authority for Audiovisual Communication, HACA, is an Independent Administrative Authority (IAA) which plays the role of regulator. According to HACA's description of itself on its website *"it is placed for this purpose under the tutelary protection of His Majesty the King; which protects it from all forms of pressure likely to hinder the fairness required by its regulatory mission. Its primary role is to ensure compliance with the principles of pluralism, diversity and freedom of expression in the field of audiovisual communication, in accordance with the fundamental values of civilization and laws of the Kingdom"*⁴.

The notion of royal "tutelary protection" appears in the third recital of the Dahir establishing the authority. The President, the 8 members of the Higher Council (4 of whom appointed by HM the King, 2 by the Head of the Government and 2 by the two Houses of Parliament) and the Director General are appointed by the King.

- Composition of HACA

The High Authority is composed of the Higher Council for Audiovisual Communication (CSCA), a deliberative body, and the Executive Office for Audiovisual Communication (DGCA), an administrative and technical body.

- The Higher Council for Audiovisual Communication (CSCA) is the deliberative body of the High Authority. Therefore, it makes administrative decisions which may be appealed to the Administrative Court of Rabat. However, only legal persons, with the legal form of a limited company, may create a TV channel or a radio station. Therefore, a political party or an association may not create a TV channel or a radio station⁵.

¹ <http://www.haca.ma>

² <http://www.haca.ma/pdf/monopole.pdf>

³ Law No.77-03 on audiovisual communication, op.cit.

⁴ HACA, Presentation, <http://www.haca.ma/indexFr.jsp?id=27> (Visited on 15th February 2013).

⁵ <http://www.haca.ma>

- The Executive Office for Audiovisual Communication (DGCA), is placed under the authority of the Director General appointed by HM the King and includes the administrative and technical services of HACA in five departments: (Administrative and financial, Programme Monitoring, Legal Studies, Technical Infrastructure and Technological Watch and Research and Development). It fulfills its mission thanks to the joint efforts of its services and units such as: the Unit for Auditing and Management Control, the Computer Unit and finally the Unit for Documentation.

- The duties of the Higher Council for audiovisual communication

Article 3 of the Dahir lists the 17 duties of the Higher Council for Audiovisual Communication:

- 1. To give an advisory opinion to Our Majesty on any matter Our Majesty refers to it, in the field of audiovisual communication;*
- 2. To propose to Our Majesty's choice, personalities to be appointed by Our Majesty in respect of public service or employment they must exercise at the head of government agencies in the audiovisual field;*
- 3. To advise Parliament and government on any matter referred to it by the Prime Minister or the presidents of the Houses of Parliament in the field of audiovisual communication;*
- 4. To give compulsory advice to the Prime Minister on draft bills or decrees relating to the audiovisual sector before submission to the Council of Ministers;*
- 5. To give compulsory advice to the presidents of both Houses of Parliament on bills relating to the audiovisual communication sector prior to consideration by the House;*
- 6. To propose all types of measures to government, especially in the legal field to allow compliance with the principles stated in the preamble and the provisions of the present dahir;*
- 7. To suggest legislative and regulatory changes to the government, as required by the technological, economic, social and cultural progress of activities in the audiovisual sector;*
- 8. To ensure compliance by all authorities or relevant bodies with the laws and regulations applicable to audiovisual communication;*
- 9. To examine applications for creating and operating companies of audiovisual communication in accordance with the legal procedures and regulations in force and to grant the corresponding authorizations thereto in accordance with the laws and regulations;*
- 10. To grant authorization to use radio frequencies allocated by the National Regulatory Agency for Telecommunications to the audiovisual communication sector. To this end, and if necessary, the Council may establish a committee to coordinate with other government agencies responsible for the management and control of the frequency spectrum;*
- 11. To control audiovisual communication organizations' compliance with specifications and in a general way their compliance with the rules applicable to the sector;*
- 12. To approve the specifications of national broadcasting companies and ensure compliance;*
- 13. To ensure compliance with pluralistic expression of thought and opinion, especially in political information by both the private and public audiovisual sectors. To this end, and on the*

basis of an established frequency, the Council informs the government, the presidents of both Houses of Parliament, political party leaders, leaders of unions and professional organizations represented in Parliament, the time sheet indicating political, union or professional figures' intervention time in radio and television programmes; it may for that matter make any observations deemed appropriate;

14. To ensure compliance with the laws and regulations applicable to the rules and conditions of production, programming, and broadcasting of programmes on electoral campaigns that public and private communication agencies must comply with;

15. To ensure compliance with the laws and regulations in advertising by audiovisual communication organizations;

To this end, the council uses whatever appropriate means to exercise control over commercials broadcast by communication organizations of the public sector or those operating in the sector under permit;

16. It penalizes violations committed by audiovisual communication organizations or proposes penalties to the competent authorities in accordance with the law and with the relevant specifications;

17. It enacts the legal or technical standards applicable according to the audience of audiovisual communication companies.”

Article 63 of Law No. 77-03 on audiovisual communication states that: “operators of audiovisual communication are required to provide the High Authority all necessary information or documents to ensure compliance by operators with the obligations set upon them by laws and regulations and by their specifications. The High Authority is empowered to subject these individuals to investigations in accordance with article 15 of Dahir No. 1-02-212 regarding the High Authority.

3.3. The terms of reference of national public broadcasting companies

Under article 54 of law 77-03 on audiovisual communication: the “Moroccan Radio and Television” (R.T.M) and “Autonomous Advertising” (S.A.P) have been turned into a national corporation called “Société Nationale de Radiodiffusion et de Télévision» (S.N.R.T) (Public Radio and Television Broadcasting Company) governed by the law on public limited companies, the present law and its statutes. The State owns the entire capital of SNRT; an audiovisual public pole including channel 2M¹, was created to meet the challenge of competitiveness resulting from opening national media landscape to competition.

Subject to definition in article 49 of Law No. 77-03, specifications are set by the government, approved by the High Authority for Audiovisual Communication and published in the Official Journal.

In addition to the principles and rules of public nature, the specifications include all the provisions relating to the rights and obligations of national public broadcasting companies, mainly in terms of the following commitments:

¹ 2M was launched in 1989 as pay-television (subscription-based). Since 1996, 2M is part of the public service as it became entirely owned by the Moroccan State following huge financial difficulties; as it was also the case with RTM, the first and incumbent channel of the public pole.

- Establishing the network and coverage area;
- Using Moroccan human resources;
- Complying with copyright and related rights;
- Broadcasting Moroccan audiovisual works ;
- Contributing to the production of Moroccan audiovisual works ;
- Committing to the fairness and reliability of the information, to protecting young people, to showing respect to privacy and to independence from private interests and public authorities¹.

3.4. The Constitution of 2011

The new Constitution² published on 17th June and adopted by the referendum of 1st July 2011 reasserted Morocco's commitment to universal principles of Human Rights and reinforced legal protection of freedom of expression.

Article 25 stipulates that: "Freedoms of thought, of opinion and of expression in all its forms are guaranteed. Freedoms of creating, publishing and exhibiting in the literary and artistic fields and in relation with scientific and technical research are guaranteed".

According to article 10, "The Constitution guarantees that parliamentary opposition has the status ensuring its rights to fulfill its mission relating to parliamentary work and political life. It ensures in particular the following rights to the opposition":

- Freedom of opinion, of expression and of assembly,
- Air time in official media proportional to its representativeness".

Article 28 stipulates that "freedom of the press is guaranteed and may not be limited by any form of prior censorship. The right of free expression and dissemination of information, ideas and opinions is guaranteed to all only within the limits expressly laid down by the law. Public authorities promote the press sector in an independent way and on democratic foundations and the corresponding legal and ethical rules. The law lays down the rules for organizing and controlling public means of communication. It ensures access to these means respecting linguistic, cultural and political pluralism of Moroccan society. Pursuant to the provisions of article 165 of the present constitution, the High Authority for Audiovisual Communication enforces this pluralism".

Article 165 confirms the role of the High Authority for Audiovisual Communication: the High Authority for Audiovisual Communication is responsible for ensuring compliance with the pluralistic expression of opinion and thought and with the right to information in the audiovisual sector in accordance with the fundamental values of civilization and the laws of the Kingdom".

3.5. Limits on freedom of expression

Article 9 of the law on audiovisual communication sets the limits on freedom of expression.

Without prejudice to the penalties provided by the law, programmes or programme retransmissions or parts of programmes must not:

¹ Ibid.

² The document is available on Morocco's National Portal :
<http://www.maroc.ma/PortailInst/Fr/logoevenementiel/Projet+de+la+nouvelle+constitution.htm>

- *prejudice the dogmas of the Kingdom of Morocco as defined by the Constitution, notably those related to Islam, to territorial integrity of the Kingdom and to the monarchy ;*
- *undermine public morality ;*
- *praise and serve the exclusive interests and the cause of political, ethnic, economic, financial, or ideological interest groups ;*
- *Advocate violence, racial discrimination, terrorism or violence towards a person or a group of persons because of their origin, or their belonging or not to an ethnic group, a nation, a race or a specific religion ;*
- *provide incentives for behaviours harmful to health, to the security of persons and property or to the environment;*
- *make allegations, statements or misrepresentations in any form whatsoever likely to mislead consumers ;*
- *prejudice the rights of children as universally recognized”.*¹

¹ Law No. 77-03 on audiovisual communication, *op.cit*, article 9

4. DISTRIBUTION METHODS OF AUDIOVISUAL SERVICES

4.1. Number of households and of TV households

The number of households was estimated in 2011 by the High Authority for planning at 6.813 millions¹. TNS, an organization in charge of audience measurement in Morocco defines the universe as being 5.666 million TV households in 2011². The rate of television penetration would be around 85 %.

4.2. Terrestrial broadcasting

4.2.1. Terrestrial analogue television (TAT)

ITU Geneva Conference in 2006 adopted for Zone I the date of transition to-all-digital and of analogue extinction in 2015 for UHF band, 2020 for VHF band (100% of SNRT main network)³. In principle, terrestrial analogue television broadcasting would end by end 2012 in all the countries of the European Union.

As far as Morocco is concerned, according to the Geneva regional agreement in 2006, the networks of terrestrial analogue television in UHF band would cease broadcasting on 17th June 2015 at the latest. This date is for the entire terrestrial analogue network of Soread-2M and partially of SNRT (which broadcasts in VHF Band).⁴ Licences granted to private Moroccan channels by HACA provide for the extinction of the analogue signal in June 2015.

4.2.2. Terrestrial digital television (TDT)

In 2006, the Ministry of communications initiated work on the development of terrestrial digital television (TDT).

The timeline for developing TDT was the following:⁵

- January - May 2006: Technical feasibility carried out by a working group of the Ministry of Communications, HACA, ANRT, SNRT and SOREAD-2M
- April 2006: Provisional assignment of two channels to SNRT (Rabat and Casablanca) for TNT experimental use. Beginning of experimentations
- May 2006: Report on the introduction of terrestrial digital television in Morocco (adoption of the broadcasting standard DVB-T for fixed reception; DVB-H for mobile and portable reception, adoption of the compression standard MPEG 2 for TV Standard Definition and MPEG 4 for High Definition TV and mobile reception)
- 17th June 2006: Adoption of the Geneva plan
- July 2006 to the present : continued planning of the international coordination spectrum; Immediate legal impact study;

¹ HCP, Increase of number of households (in thousands) per area of residence: 1960-2030, http://www.hcp.ma/Evolution-du-nombre-de-menages-en-milliers-par-milieu-de-residence-1960-2030_a707.html

² TNS TV Panel Diary, Morocco 2011 quoted in EURODATA-TV Worldwide, *One Year TV Worldwide- One Television Year Partis*, March 2012.

³ Ahmed GHAZALI, President of HACA, 10 December 2010 : Terrestrial digital television "Introduction of TNT in Morocco", Morocco : <http://41.249.251.219/fra/news/20111203203926/20111203203926.html>

⁴ Mohamed HAMMOUDA, « La transition analogique numérique. Analogue Switch Off (ASO) ; Clés du succès ». Presentation at the conference on terrestrial digital radio broadcasting, Cotonou (20-22 December 2010), http://www.haacbenin.org/IMG/pdf/LA_TRANSITION_ANALOGIQUE_NUMERIQUE_Maroc_.pdf

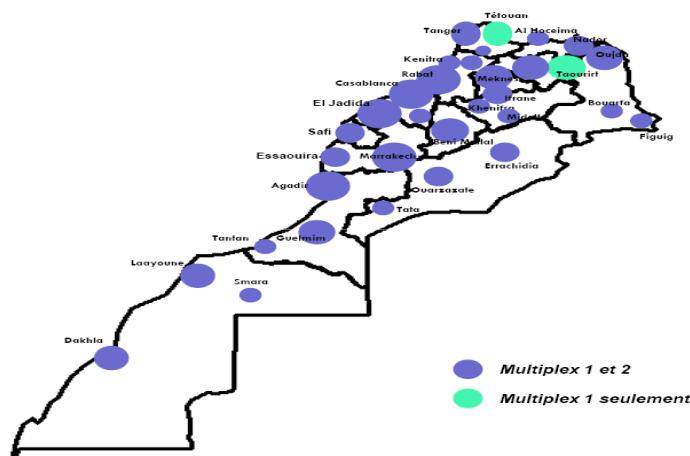
⁵ A. GHAZALI, op.cit.

- June 2007 : Final assignment to SNRT of the necessary frequencies for the deployment of TDT broadcasting services of the public pole (6 basins out of 12 in simulcast)
- November 2007: Provisional assignment of a local frequency for the channel of Marrakech International Film Festival. Experimenting with the implementation of a local signal in a national multiplex.
- March 2008 : Final assignment to SNRT of the necessary frequencies for the deployment of TDT broadcasting services of the public pole (12 basins out of 12 in simulcast)
- May 2008: Launch of Personal Mobile Television (DVB-H)
- July 2008: Assignment to SNRT of one frequency per site to operate a second multiplex (designed to accommodate the new private editors from 2009)
- August 2008: Launch of a call for tenders for two private television channels with national coverage (in simulcast)
- In 2010, the terrestrial digital television network of TNRT had 35 stations, providing coverage to 73 % of the population.
- In October 2012, TDT service is available to 80% of the population.

Network deployment : TNT Stations (2010)

Etat des lieux du déploiement de la TNT au Maroc

1. Déploiement du réseau: Stations TNT



Haute Autorité
de la Communication Audiovisuelle

الهيئة العامة
للإتصال السمعي البصري

The network consists of two multiplexes. With a simple UHF antenna and TDT receiver or a TV set with integrated TDT tuner, viewers have free access to digital programmes out of a multi-programme service of general-interest and theme-based Moroccan channels: Al Aoula, 2M, Arryadia, Arrabiâ and Assadissa. Since 31st May 2008, the new film channel Aflam TV¹ is broadcast only on TDT.

Etat des lieux du déploiement de la TNT au Maroc

2. Deux Multiplexes

Le 1^{er} multiplex

2 chaines généralistes



3 chaines thématiques



Le 2^{ème} multiplex

1 chaine Cinéma



1 chaine Amazigh



Haute Autorité
de la Communication Audiovisuelle

الهيئة العامة
للإتصال السمعي البصري

The initiative of providing free digital content to Moroccan viewers cost the State 12 million USD². Yet, the transition does not seem to have enthralled the Moroccan public: only 100,000 TDT receivers have been sold; which represents 0.3% of TV households in Morocco³. The failure of TDT in Morocco is due to the large proportion of TV households who continue watching television via the terrestrial analogue antenna or satellite without having to buy a receiver or invest in a digital flat panel (Plasma or TFT), with a minimum of 10.000 DH⁴. The report « *Media et société au Maroc Synthèse et recommandations de la feuille de route Dialogue national « Media & Société »* » (Media and Society in Morocco ; summary and recommendations of the road map National Dialogue ; Media and Society) published by the Moroccan Parliament in October 2011 found that “while Morocco is on the way to ensuring universal TDT coverage, it would be fair that a tax reduction (of 20%) on TV sets with TDT receivers be granted until all households get TDT equipment; a moratorium until 2015, international deadline to make TDT universal⁵.”

¹ Société Nationale de Radiodiffusion et de Télévision, SNRT (Public Radio and Television Company) : <http://www.snrt.ma/tnt.php>

² Ibid.

³ *Mapping Digital Media : Morocco, op.cit.*, p. 21

⁴ Morocco : Satellite against Terrestrial Digital Television (TDT), Europe, Morocco, www.europemaroc.com, <http://europemaroc.com/tnt.html>, Morocco 2007.net

⁵ http://www.mediasociete.net/index.php?option=com_docman&task=doc_view&gid=148&Itemid=77&lang=fr

The allocation of new licences was announced in early 2012. According to Maroc-Hebdo, "HACA is working on the third phase of radio and television licences which does not seem to be an easy one given the narrowness of the advertising market and the weakness of Terrestrial Digital Television (TDT). In the third phase of radio and television licences which will take place during the first half of 2012, many television licences may be allocated, according to Khalid Ourai, speaking on behalf of the High Authority for Audiovisual Communication (HACA). But it all depends upon the available frequencies and the capacity of the advertising market to absorb the new channels. According to HACA official "two or three channels at least may be created in 2012"¹. The allocation of new licences seems to have been delayed due to the crisis which occurred at HACA in the spring of 2012 (see below 5.8)

International collaboration in TDT

In September 2012, a HACA mission visiting the French CSA was to study the aspects of the French transition². HACA also contributed to the discussion and training on transition in other African countries, when it chaired the regulation and communications network of African agencies in 2011.³

4.3. Satellite television

Moroccan cities are lined with dish-antennas as every urban home has its own antenna offering over 800 free channels. Satellite is the most common and efficient means of TV viewing, and the most favoured by Moroccan households.

According to data published by the European Eutelsat in 2010, there are in Morocco 5,548 million households, including 4,655 million equipped for satellite reception⁴, which means 83.9% of TV households and 71.4% of households are equipped. The data of the *Establishment Survey* used by TNS, in 2011, indicate a smaller penetration since it estimates that 75% of TV households receive television via satellite or IPTV.⁵

The European satellite operator Eutelsat covers transmission of almost all Moroccan channels. In 2010, Eutelsat stated that 4,117 million Moroccan households received signal transmission via Atlantic Bird TM 4 A and 2,758 million Moroccan households are likely to receive signals via Hot Bird (13° East) satellites. The Egyptian satellite Nilesat covers transmission of Moroccan channels to reach the Arab world. Morocco resorts to Hot Bird to broadcast in Europe, and Telestar to broadcast in North America.

There are for the moment no Moroccan operators of satellite pay television. Moroccan viewers can subscribe to Arab multi-programme services (ART, Orbit, and Showtime). In 2009, Canal

¹ « De nouvelles licences de télévision pour 2012 », *Maroc Hebdo*, s.d ; http://www.maroc-hebdo.press.ma/Site-Maroc-hebdo/archive/Archives_958/html_958/nouvelles.html

² « Autorégulation de la publicité et l'exécution des cahiers des charges : Mission d'études de la HACA à Paris », *Libération*, 4 September 2012, http://www.libe.ma/Autoregulation-de-la-publicite-et-l-execution-des-cahiers-des-charges-Mission-d-etudes-de-la-HACA-a-Paris_a30402.html ; See also : *Mission d'études de la HACA à Paris sur l'autorégulation de la publicité et l'exécution des cahiers des charges*, HACA Press release, 03 September 2012, accessible at <http://www.haca.ma/newsDetail.jsp?version=&idInfo=732>

³ « Réseau des instances africaines de régulation de la communication : La HACA présente son bilan de présidence », *Libération*, 27 December 2011. http://www.libe.ma/Reseau-des-instances-africaines-de-regulation-de-la-communication-La-HACA-presente-son-bilan-de-presidence_a23936.html

⁴ EUTELSAT, Cable and Satellite TV Survey 2010, <http://www.eutelsat.com/products/pdf/cable-satellite-survey-2010.pdf>

⁵ EURODATA TV, *One Year in television* 2012, p.162.

Plus launched a service Maghreb; but it was interrupted end of 2011 because of excessive piracy.¹

4.4. Cable network television

There is no cable distribution in Morocco.

4.5. ADSL network television (IPTV)

Due to the lack of development of cable networks, telecommunication infrastructures (mobile, DSL networks and broadband) appear as the main alternative to satellite reception. In May 2006, HACA authorized Maroc Telecom, the main telecommunications operator, to broadcast national and international channels via ADSL. The national operator then launched a multi-programme service via ADSL “Bouquet TV via ADSL”, later rebaptized “Maroc Telecom TV”. Maroc Telecom offers existing television programmes in the form of distinct packages and decided which channels to include². The inclusion of new channels in the marketed multi-programme services is subject to HACA approval. In 2009, four multi-programme services, with over 80 national and international, general-interest and theme-based channels were made available by Maroc Telecom; a first timer in Morocco, Africa and the Arab world. Later, the package was reduced to three multi-programme services: an access service (48 MAD including taxes/month), prestige service + access service (150 MAD including taxes/month), Escape + prestige + access services (239 MAD including taxes/month).

¹ « Canal+ se retire des marchés algérien et marocain », *Le Monde*, 1st March 2011. http://www.lemonde.fr/actualite-medias/article/2011/03/01/canal-se-retire-des-marches-algerien-et-marocain_1486969_3236.html According to Nabil Ayouch, President of the Moroccan Association against Piracy (Amlp): “In the audiovisual sector, piracy has reached a rate of 95%. The withdrawal of Canal plus Overseas in the Maghreb is a recent concrete example”. Quoted in “Contrefaçon et piratage: 20 milliards de DH perdus chaque année”, *L’Economiste*, 24th May 2011, <http://www.leconomiste.com/article/883571-contrefaconpiratagebr20-milliards-de-dh-perdus-chaque-annee>

² <http://tvadsl.iam.ma/>

Multi-programme television services offered by Maroc Telecom TV (November 2012)

Formulaire de parrainage

En option

الرياضية

48 Dh TTC/mois

BOUQUET D'ACCÈS

Chaînes gratuites

GÉNÉRALISTES

2M, LBC, TV5MONDE, TV5, LCI, 3, 2, 1, 4, 5, 6, 7, 8, 9, 10, 11, 12, 13, 14, 15, 16, 17, 18, 19, 20, 21, 22, 23, 24, 25, 26, 27, 28, 29, 30, 31, 32, 33, 34, 35, 36, 37, 38, 39, 40, 41, 42, 43, 44, 45, 46, 47, 48, 49, 50, 51, 52, 53, 54, 55, 56, 57, 58, 59, 60, 61, 62, 63, 64, 65, 66, 67, 68, 69, 70, 71, 72, 73, 74, 75, 76, 77, 78, 79, 80, 81, 82, 83, 84, 85, 86, 87, 88, 89, 90, 91, 92, 93, 94, 95, 96, 97, 98, 99, 100

150 Dh TTC/mois

BOUQUET PRESTIGE

99 Dh TTC/mois En option avec la MT BOX

239 Dh TTC/mois

BOUQUET EVASION

169 Dh TTC/mois En option avec la MT BOX

BOUQUET D'ACCÈS + BOUQUET PRESTIGE

DIVERTISSEMENT ET DÉCOUVERTE

histoire, Ushuaia tv, Maison +, Cuisine +, PLANET +, STYLIA, SPORT, M6, MUSIQUE, mcm, mcm POP, mcm TOP, mezzo, CINEMA, W9, 13ème RUE, Syfy, june, ENFANT, tiji, ptiw, gulli, M6+On +

In terms of information and news, Moroccan television channels as well as most international news channels in streaming are included¹. However, the dominance of French channels deserves reporting. It is based on the argument that it caters for Moroccan Francophone elite². With the exception of Al Jazeera, Al Arabiya, religious channels, and the national channel Assadissa, Arab channels are absent.

Maroc Telecom TV also provides interactive services (with pauses and delayed viewing for 14 channels, catch-up television services for three channels RTM1, 2M and MediTV)³ and access to radio stations.⁴

Mapping Digital Media emphasizes that Maroc Telecom produces no content in terms of news but that has nevertheless not affected the availability of news. TV channels are already available in the multi-programme packages and are accessible to Moroccan TV viewers via satellite; with the exception of entertainment channels on subscription such as Canal+ and National Geographic⁵. It is worth recalling however, that in 2008, Maroc Telecom bought 39% of Medi Sat 1 shares.

¹ Al Oula, 2M, Medi 1 Sat, Al Jazeera (both Arabic and English services), BBC News, CNN, Al Arabiya, etc.

² The included French channels: TF1, France 2, France 3, France 5, TV5, LCI, Canal +, Canal + Cinéma, Canal + Famille.

³ http://tvadsl.iam.ma/Controle_du_directe.aspx

⁴ <http://tvadsl.iam.ma/Radios.aspx>

⁵ *Mapping Digital Media: Morocco, op.cit*, p. 60

In late 2011, Maroc Telecom stated there were 494,754 ADSL subscribers.¹ At the end of the third quarter of 2012, the number of subscribers reached 648,000.²

Maroc Telecom monopoly on IPTV has been the subject of criticism. Omar El Hyani, telecommunications engineer and blogger, writes: *“There are many reasons for it. First, apart from optical fibre infrastructures owned by Méditel and Wana, Maroc Telecom is the only operator to own a fixed network in the country; which is for obvious historical reasons. In the times of PTT and ONPT, the only means to channel telephone to Moroccan households was the good old traditional pair of copper. Maroc Telecom is still running and expanding the network, but is much slower than mobile networks. To avoid the monopoly by incumbent operators on ADSL, (a technology which may exclusively transit by fixed network), regulators have established a widely used practice in other parts of the world: unbundling. Any operator willing to market ADSL services must pay the incumbent operator (who owns the fixed network) a fee representing the “rent” of the landline. Unbundling may be partial if the subscriber chooses a conventional telephone subscription with the incumbent operator and an ADSL subscription with another operator; or the whole subscription fee if the user chooses to no longer pay for any subscription to the incumbent operator. The equation is a simple one for an ADSL operator. If the fee is low enough to allow offering an ADSL subscription at an attractive price it becomes worth the effort. Otherwise, the operator prefers offering other solutions to its clients for internet access. And this is exactly what Méditel and Wana had decided to do. The fee (set by ANRT) to pay to Maroc telecom is considered too high. It is 100 Dh, taxes not included, per month, which the ADSL operator pays to Maroc Telecom. These operators have therefore massively turned towards 3G technology which offers relatively high speed for mobile networks, without reaching the level of comfort offered by ADSL”.*³

4.6. Personal mobile television (PMT)

Personal mobile television (PMT) for viewing TV programmes on one's mobile telephone, even in motion, was introduced in Morocco in May 2008 by SNRT which had chosen the European DVB-H standard.

Coverage was initially limited to the axis Casablanca-Rabat, and was afterwards expanded, during 2009 to the whole country. The service is currently available in Casablanca, Rabat, Oujda, Tangiers and Meknès⁴.

In Africa, this technology is only available in Morocco and South Africa⁵. SNRT offers this new service for no charge, allowing mobile users to receive national channels. The multi-programme service includes two general-interest channels, Al Aoula and 2M, and three theme-based channels, Arryadia, Arrabia and Assadissa.

¹ Maroc Telecom 2011 flyer <http://www.iam.ma/Lists/Tlchargement%20Finance/Attachments/354/D%C3%A9pliant-Maroc-telecom-2011.pdf>

² MAROC TELECOM, “Résultats consolidés des neuf premiers mois 2012”, Press release, 30 October 2012, http://www.iam.ma/Lists/Tlchargement%20Finance/Attachments/415/MarocTelecom_CP-Resultats-9M-2012-FR.pdf ; « Groupe Maroc Telecom : Un chiffre d'affaires consolidé en retrait de 3% à fin septembre 2012 », *Libération*, 31 October 2012, http://www.libe.ma/Groupe-Maroc-Telecom-Un-chiffre-d-affaires-consolide-en-retrait-de-3-a-fin-septembre-2012_a31902.html

³ Omar EL HYANI, “L'incompréhensible monopole de Maroc Telecom”, *Omar El Hyani's blog*, 2 February 2012, <http://www.elhyani.net/adsl-l%E2%80%99incomprehensible-monopole-de-maroc-telecom/>

⁴ <http://www.snrt.ma/tmp.php?page=1>

⁵ *La mise à niveau du paysage audiovisuel marocain*, Department of Audiovisual media, Cinema and NTI/ Executive Office of Studies and Media Development / Ministry of Communications, Rabat, 2011-2012, p.14

Development of TMP services in Morocco will highly depend upon role distribution between terrestrial distributors, mobile operators and content suppliers. TMP is still an emerging market in the Kingdom requiring a specific economic model and a method of network deployment.

4.7. 3G television

On 14th January, HACA approved the marketing by Maroc Télécom of the multi-programme service “TV sur mobile” (TV on mobile)¹ as audiovisual communication service with conditional access. The multi-channel group includes eight Moroccan channels: four general-interest channels Al Aoula, 2M, Medi1 TV and Al Maghribia, three theme-based channels Arryadia, Arrabia and Assadissa and one regional channel Laâyoune TV. Six foreign channels are also available: TV5 Monde (FR), CNN International (GB²), Al Jazeera International (QA), Mazzika and Mazzika Zoom (EG).

HACA set the terms of operation in terms of content, of terminal interoperability and service compatibility with receiving equipment. This mobile broadband service is broadcast in “point to point” mode in contrast to TMP “broadcast” in mode DVB-H. According to HACA, to date, subscribers can access audiovisual services on their mobiles only by receiving a constant flow (or “streaming”) specifically dedicated.

4.8. Internet television

As in the rest of the world, it is possible to receive channels live on Internet (fixed or mobile). Available channels are listed on websites such as Global Internet TV³, IPTV Guide⁴ or Lyngsat Stream⁵.

Web-TV channels may also be received through aggregator services that fit the signal in their own player. An aggregator of web-TV channels such as Livestation for example has 14 news channels in Arabic (including Al Jazeera, BBC, France 24, Euronews, RT, CNBC, Deutsche Welle, and Sky News)⁶. Morocco Fraja⁷ provides internet users with the Moroccan channels: Al Oula, 2M, Arriyadia, Al maghribiya, Medi1 TV and Tamazight. The Arab website Media offers channels of Arab countries in streaming, including six Moroccan channels.⁸ The French website TV-Direct.fr offers 2MTV and TV Sahara in streaming.⁹

¹ Ruling of CSCA No. 01-09 of 17 Moharram 1430 (14 January 2009) authorizing the marketing of the multi-channel group “TV on Mobile” for the benefit of the company “Itissalat Al Maghrib”, http://www.haca.ma/html/decision_01_09_iam_VF.htm<http://www.iam.ma/Groupe/Institutionnel/Actualites/Pages/DetaillEvenementsetCommerciales.aspx?itemID=11>

² The CNN version received in Morocco is CNN/ Middle East / Africa, with a licence from British OFCOM. <http://www.ofcom.org.uk/static/tvlicensing/cs/1956.htm>

³ <http://www.global-itv.com/>

⁴ <http://www.iptv-guide.com/>

⁵ <http://www.lyngsat-stream.com/>

⁶ <http://www.livestation.com/en/ws/#>

⁷ <http://www.marocfraja.com/>

⁸ <http://www.arabe-media.com/>

⁹ <http://www.tv-direct.fr/maroc.php>

Finally, signals of television channels may also be received for playback on PC or tablet via applications available on "Application stores" such as iTunes Stores (Apple), Google Play Store (Google), Amazon Appstore for Android (Amazon).

Applications to access the channels 2M Maroc, Medi1TV and Laâyoune TV are available on l'iTunes Store French (provided by the limited liability company iTunes based in Luxembourg). We note however that there is no iTunes Store for Morocco (while there are, for most Arab countries). The absence of iTunes Store in Morocco is subject to critical comments on Internet¹ and induced "jailbrakage"² practices.

Concerning Google Play Store (earlier "Android Stire"), Morocco is one of the countries where free applications³ and applications for a fee⁴ can be distributed. Free applications open access to Moroccan channels. Laâyoune TV⁵, Medi1 TV⁶ are available on Google Play Store.

4.9. Connected television

With "Smart TV" receivers connected to Internet, one may view on connected TV audiovisual services accessible through applications which are either installed on the receivers or can be downloaded from the stores which manufacturers design. Access to stores is geo-localized, making it possible to identify what services are accessible in Morocco.

- In November 2012, LG store for Morocco offers twenty applications, with only one for television: the international news channel RT (Russia Today), based in the UK.⁷

The other manufacturers, (Panasonic, Philips, Sony, and Toshiba) do not offer stores for Morocco. Moroccan buyers of Smart TV receivers of these brands equipment find the applications installed on these receivers. But access to services (likely to be blocked by DRM) is not certain. As in Europe, manufacturers must inform users of accessible services in the country with this or that receiver.

In the absence of a SmartTV receiver, Moroccan users with receivers with HDMI connection and broadband access may connect their computer or tablet to their TV set and view audiovisual services on their television screens (television and services on demand) available in the country on internet.

¹ See for example Fouad, « Le Maroc est prêt pour son iTunes Store », 15 March 2012, <http://www.macmaroc.com/le-maroc-est-pret-pour-son-itunes-store/>

² « Comment créer un compte iTunes Store, App Store sans carte de crédit », *Applestore Morocco* (non official website), 30 March 2012. <http://www.applestore.ma/cydia-jailbreak-installous/comment-cree-un-compte-itunes-store-app-storesans-carte-de-credit-1062.html>

³ <http://support.google.com/googleplay/android-developer/bin/answer.py?hl=en&answer=138294>

⁴ <http://support.google.com/googleplay/android-developer/bin/answer.py?hl=en&answer=143779>

⁵ https://play.google.com/store/apps/details?id=com.app.tvlaayoune&feature=search_result#?t=W251bGwsMSwxLDEslmNvbS5hcHAudHZsYWVF5b3VuZSJd

⁶ <https://play.google.com/store/apps/details?id=mediamobility.med1tv.android>

⁷ http://ma.lgappstv.com/appspc/main/main/main.lge?lang=fre_MA

5. THE MOROCCAN TELEVISION LANDSCAPE

5.1. From monopoly to theoretical liberalization of ground airwaves

During the last decade, the television landscape in Morocco was subject to many changes. The liberalization of the sector along with the technological and economic progress had a strong impact on the television landscape in Morocco which it radically changed. Moroccan television system revolves around two poles: a public and a private pole. It can be broken down into three categories of channels: TV channels with national coverage, TV channels with multi regional coverage and TV channels with regional or local coverage.

On the way to making the sector more democratic and modern there was the creation of the High Authority for Audiovisual Communication (HACA), the removal of State monopoly in radio and television broadcasting (in accordance with the executive order of September 2002), and the enactment of Law No. 77-03 on audiovisual communication.

While defining on the one hand, the role and organization of the public sector and on the other the technical rules and legal provisions relating to private operator practice in this sector, the law re-shaped the television landscape in Morocco. Fair citizen access to a variety of complementary services taking into account the market economic and cultural features as well as user needs, has become a national strategic goal.

In this context, the law provided public radio broadcasting and television bodies a modern and flexible status. Moroccan Public Television and Radio (RTM) and Autonomous advertising Service (SAP) were turned into a limited company called National Radio and Television (SNRT)

Besides, with the role of public service that the law granted it, the second public channel SOREAD 2M created with SNRT a public broadcasting centre that has the capacity to meet the challenge of competitiveness that the opening of the national media landscape to competition entails.

Moroccan media system is composed of a mixture of public and private companies and enables government to provide a public service. Most print publications in the Kingdom are owned by political parties and an increasing number now by private individuals. Political party newspapers receive grants¹.

Television remains largely state-owned and represents the editorial medium of the government. The six licences granted in 2006 were to government television channels with the exception of Medi1 TV (See 5.3.3). All new channels are theme-based with the exception of Laayoune and Medi1 TV. Whereas Laayoune TV is meant as a local channel and covers all the provinces of the south, Medi1 TV claims to be a news channel with debates, documentaries and entertainment programmes. The other channels are Arriyadia (Sports), Assadissa (religion), Arrabia (education and culture), Aflam TV (films) and Tamazight TV (general-interest; in Amazigh).

As far as provisions on ownership, article 21 of law 77-03 stipulates that a licensed operator of audiovisual communication may directly or indirectly own capital equity and/or voting rights in another licensed operator with the same corporate purpose, provided the share does not exceed 30% of the capital or the voting rights². This avoids having one broadcasting company controlling more than one media.

¹ *Mapping Digital Media : Morocco*, op.cit, p.63

² Law No.77-03 on audiovisual communication, op.cit, article 21, p. 13

It should be noted that it is the radio which most benefited from the liberalization of the Moroccan audiovisual sector. There are currently 19 private radio stations¹ (RMI, SAWA, ATLANTIC, Radio Plus Agadir, Radio Plus Marrakech, MFM SAISS, MFM Souss, MFM ATLAS, MFM Sahara, MFM Oriental, Cap radio, ASWAT, CHADA FM, HIT Radio, Radio Mars, Radio Luxe, Medradio and Medina FM). In May 2006, when HACA delivered a single satellite television licence, ten licences to establish and operate radio stations expanded the national panorama. In 2009, HACA granted four other radio licences; no other private television licence was delivered.

The Moroccan market of audiovisual service consists mainly of local and satellite channels of the public broadcasting centre. In the absence of licence delivery to establish and operate a private television service, the terrestrial television landscape, with all its channels is subject to State monopoly.

Despite the significant changes during the last decade in terms of the legal status and the organization of the audiovisual sector, there have been no private channels on the television market. Unlike other audiovisual markets in the Arab-Mediterranean region such as in Egypt or Lebanon, where private television service is over 70% of the channels, service on the Moroccan market is restricted to national public channels.

In 2011, institutions and civil society in Morocco explored the prospects of a new media policy. The results of their discussions were published in 2011 in the report by Parliament « *Média et société au Maroc Synthèse et recommandations de la feuille de route. Dialogue national «Media & Société»* »² (*Media and Society in Morocco. Summary and recommendations of the road map. National dialogue “Media & Society”*)

5.2. Main areas of new government audiovisual policy

The coming to power of Mr. Abdel-Ilah Benkiran's government, following the victory of the Party for Justice and Development at the legislative elections of 25th November 2011, generated further discussion on the evolution of television.

Upon taking office, the new Minister of Communication, Mr. Mustafa Khalfi stated to the daily *Aujourd'hui le Maroc* that “his primary goal is to ensure the enforcement of the provisions of the new constitution on freedom of the press. We shall act to consolidate the gains and establish rules of professionalism and responsibility”³. He also announced the “promotion of the role of public media, dependent on human resources development”⁴ and a “regeneration of the communications sector”.⁵ In a statement to the channel Russia Al Ayoun, he stressed that

¹ List of radio services of the private sector in Morocco, HACA : <http://www.haca.ma/indexFr.jsp?id=41>

² http://www.mediasociete.net/index.php?option=com_docman&task=doc_view&gid=148&Itemid=77&lang=fr

³ “Portrait of the new Minister of Communication Mustapha Khalfi”, Website of the Ministry of Communication, <http://www.mincom.gov.ma/fr/actualites/item/295-portrait-du-nouveau-ministre-de-la-communication-mustapha-khalfi.html>

⁴ <http://www.mincom.gov.ma/fr/actualites/item/298-m-el-khalfi-la-promotion-du-role-des-medias-publics-tributaire-de-la-valorisation-des-ressources-humaines.html>

⁵ <http://www.mincom.gov.ma/fr/actualites/item/308-m-el-khalfi-le-secteur-de-la-communication-qconnaitra-bientot-une-renaissanceq.html>

"Morocco is working for the consecration of democratic, free, responsible and innovating media"¹.

Mr. Khalfi announced the first concrete measures when he presented his first policy review during the reading of the draft Finance Act 2012, on 15th March 2012² : *"All partners have been associated in re-evaluating and reviewing the specifications of the audiovisual sector for the purpose of designing documents compliant with the constitution and the rules of governance and reflecting the political, cultural and linguistic diversity of the Moroccan society. It also concerns meeting the needs of the various components of society."*

In terms of governance in SNRT and SOREAD-2M, the councils have been re-activated (the Board, the strategy Council, the Council for wages and allowances, the Council for ethics and the Audit Council), added the Minister, who announced that the fourth channel is turned into a cultural channel and that the editorial line of "Al Maghribia" is moved closer to the Moroccan community abroad. He explained that it is aimed to developing a cultural channel and a news media in four languages, in addition to launching other channels.

Mr. El Khalfi also announced that consultations are ongoing with parliament as the ministry is responsible for relations with parliament and SNRT for the launching of a parliamentary television channel and a specialized channel on family and childhood issues."

Government has not discussed so far setting up private channels. However, under the section "Media landscape" of "Major projects" in the official Moroccan portal, new channels are announced: *"Under the law on audiovisual communication, new television channels and radio stations are soon to emerge. The general principles which underline the conditions of licence delivery and the legal conditions to meet, are within the jurisdiction of the High Authority for Audiovisual Communication, which is in fact the cornerstone of the system for implementing this law as it is the only institution empowered to set the regulation and management framework of the public and private audiovisual sector and to enforce the principles of freedom of expression and pluralism."*³

¹<http://www.mincom.gov.ma/fr/actualites/item/481--m-el-khalfi-le-maroc-oeuvre-a-la-consecration-de-medias-democratiques-libres-responsables-et-innovants.html>

² <http://www.maroc.ma/PortailInst/Fr/logoevenementiel/projet+de+loi+de+finances.htm>

³ <http://www.maroc.ma/PortailInst/Fr/MenuGauche/Les+grands+chantiers/Paysage+m%C3%A9diatique/Contexte+de+la+lib%C3%A9ralisation.htm> (Visited on 31 October 2012; Date of publication not mentioned).

5.3. The Public Pole

The public audiovisual sector in Morocco consists of two national companies which are SNRT and SOREAD 2M. Public television service includes at the moment 10 TV channels.

In terms of radio, public service is offered through five national radio stations in Arabic, Amazigh and French and 10 regional stations providing local information. Broadcasting of these radio services uses different technical forms, analogue or terrestrial digital for some, and satellite for others.

The decision of HM King Mohamed VI to appoint Mr. Fayçal Laâraichi as president of both national companies in 2006 is the cornerstone in the process of reorganizing and developing the public broadcasting sector.



5.3.1. National Radio and Television Company (SNRT)

Moroccan Public Radio and Television (RTM) opened in anticipation of Throne Day celebration in March 1962 and was initially attached to the Ministry of Information. Early 2005 it was turned into a limited company under the name of National Radio and Television Company (SNRT) under law No. 77-03. SNRT is financed by State support, publicity revenue, and the tax for promoting national audiovisual landscape (TPPAN). SNRT is a group of eight television channels with local, regional and satellite range.

Several factors contributed to SNRT public service role, namely:

- ❖ A book of specifications established by the government and approved by HACA in January 2006;
- ❖ A multi annual programme contract linking SNRT to the government. It states the public operator's goals and commitments in terms of national coverage, technological standards, service diversity and development, support to national production and sports, human resource management, and of modern and rational management.
- ❖ Launching of Tamazight TV, a general-interest channel reinforcing SNRT multi-programme system. The channel is the crowning achievement of SNRT during the 2009-2011 programme-contract term;
- ❖ Re-designing SNRT programme schedule¹.
- ❖ SNRT participated in Med-Mem project of online archives of Mediterranean televisions, with 68% funding by the European Commission. It was coordinated by INA and was launched in October 2012.² SNRT has provided around 400 programmes.³

¹ Upgrading the Moroccan audiovisual landscape, *op.cit*, p.6

² « Vidéotheque d'archives en ligne en Méditerranée : Le site Med-Mem lancé en grande pompe », Libération, 13 October 2012., http://www.libe.ma/Videotheque-d-archives-en-ligne-en-Mediterranee-Le-site-Med-Mem-lance-en-grande-pompe_a31488.html The service is accessible online (in French, English and Arabic) at: <http://www.medmem.eu/fr/>

³ <http://www.medmem.eu/fr/collection/2/SNRT+%28MA%29/col>



5.3.2. Consultancy and audiovisual production firm (SOREAD/2M)

The first private channel in Morocco, Africa and the Arab world was born on 4th March 1989 following an operating agreement binding the Consultancy and audiovisual production firm (SOREAD) to the Moroccan State. The agreement stipulated that the new channel shall show encrypted programmes with two free-to-air time slots.

At the end of five years of existence, and with the burden of financial problems, the new channel migrated from the internationally-oriented theme-based concept of the beginning to a more local, general-interest format and a clearer expression of its specificity.

The financial recovery of the managing company which occurred with the assistance of the National Fund for Audiovisual Promotion and the stimulation of the advertising market resulted in the creation of a national terrestrial public television which has been broadcasting free-to-air since 10th January 1997 presently reaching an almost total coverage of the country. The specifications set by the government and approved by HACA on 27th July 2005 determine 2M service.

Besides, on 4th March 2002, SOREAD launched its general-interest radio service: Radio 2M. With advanced equipment, Radio 2M broadcasts via satellite from Europe, Africa, the Middle East, as well as on FM.

Like SNRT, SOREAD is included in the project. SNRT participated in Med-Mem project of online archives of Mediterranean televisions, with 68% funding by the European Commission. It was coordinated by INA and was launched in October 2012.¹ SOREAD has provided around 150 programmes.²



5.3.3. Medi 1 TV

It was launched on 1st December 2006 under the name Medi 1 Sat. The channel was first created by French and Moroccan States to promote Francophone and Maghreb cultures in the Maghreb and Mediterranean region³. It had a capital of 15 million Euros, to support its early stage. 56 % of this capital was owned by Maroc Telecom and CDG (Deposit and Management Fund). The remaining shares were 30% to French share holders and 14% to radio Medi 1.

¹ « Vidéotheque d'archives en ligne en Méditerranée : Le site Med-Mem lancé en grande pompe », Libération, 13 October 2012, http://www.libe.ma/Videotheque-d-archives-en-ligne-en-Mediterranee-Le-site-Med-Mem-lance-en-grande-pompe_a31488.html The service is accessible (in French, English and Arabic) at : <http://www.medmem.eu/fr/>

² <http://www.medmem.eu/fr/collection/13/SOREAD-2M+%28MA%29/col>

³ See MEDI1TV, *Plaquette de référence*, s.d., <http://www.medi1tv.com/support/Plaquette-Instit-Medi1Tv2.pdf>

In 2008, the channel becomes 100% Moroccan when the French shares are purchased by CDG. On 4th January 2010, four new share holders make their way into the Tangiers channel: the insurance companies MAMDA and MCMA, CIMR and the credit union grouping¹.

Until 4th September 2009, Medi-1-Sat was the single private television service with a licence from HACA received during the first wave of 2006. Medi-1-Sat is internationally oriented; it broadcast for free by satellite terrestrial in digital mode to Moroccan and foreign audiences, in accordance with its specifications approved by the Higher Council for Audiovisual Communication in its ruling (CSCA) No. 33-06 of 10th May 2006.

In September 2009, Medi-1-Sat, already named Medi1 TV, became a limited company under Moroccan law with a capital owned in majority by the State. It becomes a national audiovisual company of the public audiovisual sector, broadcasting on the national territory by terrestrial analogue and/or digital. Programmes are in large part news-based, mainly on national, Maghreb and Mediterranean current events with an opening on world events.

In December 2011, the channel director, Abbas Azzouzi made the first assessment, reproduced in the daily *Libération*.² *“With 17 million viewers per month, and an awareness rate of 91% among total urban population, the Tangiers channel can boast having achieved the most, with the knowledge that it is viewed by 80% of Moroccan families and a high rate of satisfaction”.*

It was in these terms that the top management of the channel expressed its deep satisfaction at a meeting with the press on Wednesday 21st in a Casablanca palace. It was the time for Medi TV, at its first year of activity, to take stock of its achievements and to share with the audience its development prospects for 2012. “This year our challenge consisted in making changes so that our channel becomes the new television experience in Morocco and in the Maghreb” said the chief executive officer, Abbas Azzouzi, underlining that 2011 was “the year of the significant improvement of our audience share”. He then made an overview of all action carried out in order to be closer to viewers, explaining the way the channel introduced changes and variety in its programme schedule with a clear focus on news, the DNA of the channel, but also on debates, documentary programmes and sports. The largest innovation consisted in organizing entertainment with films and quality series, and with “reality shows in a framework specific to Medi TV, an original talk show during Ramadan offering a different perspective from what used to be shown so far”. It seems that the challenges were successfully met since “seventeen million TV viewers were there to discover and follow our new programmes in all their diversity”.

As far as 2012, the general-interest channel has selected the heading: entertainment, innovation and closeness. Medi1 TV is committed to offering its millions of viewers original and spectacular productions and the best of Moroccan culture. We mainly intend to strengthen “our focus around the family by designing documentary programmes on social issues, a top show dedicated to Moroccans’ everyday life concerns and a new reality show similar to the first” said

¹ « Abbas Azzouzi nouveau PDG de Medi1Sat : La chaîne ouvre son capital à quatre nouveaux actionnaires », *La Vie éco*, 5 January 2010 <http://www.lavieeco.com/actualite/abbas-azzouzi-nouveau-pdg-de-medi1sat-3266.html>
Medi 1 TV is actually affiliated to Medi 1 radio. Medi 1 Radio was launched in the framework of a French-Moroccan partnership including bank associates and major firms of both countries based on the initiative of King Hassan II and French President Valéry Giscard d'Estaing, Medi 1 Radio and Media 1 TV are pro-government media.

² « La chaîne tangéroise fête sa première année d'activité : Medi1TV séduit de plus en plus de téléspectateurs », *Libération*, 23 December 2011. http://www.libe.ma/La-chaîne-tangeroise-fete-sa-premiere-annee-d-activite-Medi1TV-seduit-de-plus-en-plus-de-telespectateurs_a23834.html

Abbas Azzouzi. The other novelty will be to make Medi1 TV accessible starting February on telephone (Iphone, Blackberry, etc.).

Referring to the issue of dubbed productions in Syrian language, the CEO noted that “Medi1 TV is a small budget channel (200 million MAD) which does not enable us to produce series in our languages. (It happens that) major productions are purchased in the Middle East and so are often dubbed in Syrian”. The CEO recalls that “while all news channels are financed by State budget, Medi1 TV’s funding is exclusively by its share holders and advertising”; adding that “advertising revenue accounted for only 7% of the market”.

5.4. Public service vs State Institutions

Radio broadcasting is closely related to public audiovisual service. It has two national public radios, Al Oula and 2 M. In accordance with the law on audiovisual communication of 2004, operators with a capital owned totally or in majority by the State are required, for general interest purposes, to perform a public service mission to meet public needs in culture, education, information and entertainment through national companies of public broadcasting.

The companies offer general-interest and diverse programmes for the widest possible audience, drawing on Moroccan, Islamic, Arab and Amazigh civilization and on values of democracy, freedom, openness, tolerance and modernity while they also encourage the creation of original works and cover national and international news. Television broadcasters are required to cater for the wide public and design programmes in Arabic and Amazigh to meet linguistic requirements in the framework of Moroccan cultural diversity.

Public broadcasting companies are required to cover Royal speeches and activities, sessions and debates taking place in both Houses of Parliament and government press releases. They are also required to grant fair air time to political groups and unions, especially in election periods¹.

The Moroccan press reflects controversy between Government and Opposition on the freedom of information². Such controversies are not special to Morocco and are similar to those in many European countries.

5.4.1. Vision of public audiovisual service

Understanding the system of public audiovisual service in the Kingdom requires placing it in a larger context, in the sociopolitical development framework carried out since 2005. The national initiative for human development (INDH) launched by King Mohamed VI remains the most important long-term development project to raise the level of society³.

INDH involves government services and civil society to act on a wide range of fields. Its projects include various issues especially education, literacy and health. The Moroccan government grants much political interest to regulating broadcasting frequencies regarded as sources of income and as necessary tools to promote and achieve development goals.

It has therefore set on reforming the public broadcasting system turning it into a public broadcasting service, while freeing it from the control by the Ministry of Communications.

¹ Law No. 77-03 on audiovisual communication, *op.cit*, articles 46-49, p. 20-22

² As an example : « Le gouvernement Benkirane veut mettre 2M au pas : Menaces sur la démocratie cathodique », Libération, 1st October 2012. http://www.libe.ma/Le-gouvernement-Benkirane-veut-mettre-2M-au-pas-Menaces-sur-la-democratie-cathodique_a31139.html ; « Les journalistes se battent pour leur indépendance professionnelle : Le SNPM dénonce l'instrumentalisation syndicale à des fins politiques à la SNRT », Libération, 2nd June 2012 ; http://www.libe.ma/Les-journalistes-se-battent-pour-leur-independance-professionnelle-Le-SNPM-denonce-l-instrumentalisation-syndicale-a-des_a27825.html ; « Abdelilah Benkirane accuse le pôle public de discréditer son image : "La télévision n'est pas l'attaché de presse de la Primature" », Libération, 1st May 2012, http://www.libe.ma/Abdelilah-Benkirane-accuse-le-pole-public-de-discrediter-son-image-La-television-n-est-pas-l-attache-de-presse-de-la_a26991.html

³ The assessment made since the creation of INDH, on 18 May 2005 to end July 2009 indicates that INDH concluded exactly 18,755 projects for around 11 billion MAD; 4.6 million people have benefited from these projects both in rural and urban environments; See : <http://maghreinfo.actu-monde.com/archives/article5991.html>

Therefore audiovisual media have been re-structured, giving rise to a regulatory body (HACA), and providing a legal framework for the private sector¹.

Yet, the report *Mapping Digital Media* reports on continued government intervention in the media content released on the airwaves; which affects the democratic transition of the country and its image abroad. According to this report, the media practices of public channels arouse politicians' journalists' and public concern and suspicion regarding the degree of freedom that is truly granted. Despite the reforms undertaken in the sector for almost a decade, features of the old system, including stale language use of media discourse, a standard media practice in third world countries, are still there especially in the State- owned and managed media.

5.4.2. Social and cultural diversity

5.4.2.1 Sensitive questions: Inter-cultural relations and multilingualism

In terms of social and cultural diversity, sensitive issues are about language, the various cultural components of the population, especially the Berber origin of its largest part² and gender. There are also other issues including sexuality, religion, and migrant communities. Yet, these are not subject to any significant discussion in the media for the purpose of raising the awareness of policy makers.

The sociolinguistic fabric of Morocco is made of a cultural mosaic. It is a melting pot of peoples and languages rooted throughout history in the social and cultural sphere of the country. Interaction reflects richness but reality is quite complex. Several anthropological and genetic studies tend to demonstrate that Berbers or Amazighs are the ancient people of North Africa³. According to Professor Jacques Rivet, however, "*Arabs and Berbers are not two separate races, even if ethno types preserved in landlocked recesses maintain this illusion. The bottom of the population is Berber but minority Arab populations were grafted over it*"⁴.

The Moroccan linguistic landscape is pervaded by national languages including standard Arabic in its classical and modern forms, Arabic dialect with its various speech forms, Berber with its three variants (rifain, tamazight, and tachelhit) and by French and Spanish, also present in the linguistic sphere since colonial times. Finally, English has prevailed in some spheres of social life, namely information, technology, economy and business.

¹ *Mapping Digital Media : Morocco, op.cit*, p.37

² The notion of ethnicity has no positive legal substance in Morocco and its sociological relevance is the object of passionate debates. As noted by the French historian Daniel RIVET, "The feeling of ethnic partitioning that a first look at the society provides must be corrected by the knowledge that Berbers and Arabs are in fact the foundation of the population. (...)" (D. RIVET, *Histoire du Maroc*, Fayard, Paris, 2012). The concept of ethnicity is however used in anthropological and cultural literature. (See for example, M. CHTATOU, *La diversité culturelle et linguistique au Maroc : pour un multiculturalisme dynamique*, Asinag, 2, 2009, Royal Institute of Amazigh culture, 2009. http://www.ircam.ma/doc/revueasing/mohamed_chtatou_asinag2fr.pdf) or else in media language. See, for example, the title of the news report aired by MEDI1TV "Morocco: Mixed couples, ethnic alliances", Report, MEDI1TV, 26 September 2012. <http://www.medi1tv.com/fr/medi-investigation-maroc-couples-mixtes-alliances-ethniques-emission-758-11>. The notion of ethnicity appears however in article 9 of the law on audiovisual communication (See below 3.5)

³ See especially, E. Gómez-Casado [et al.], *HLA genes in Arabic-speaking Moroccans: close relatedness to Berbers and Iberians* dans *Tissue Antigens*, vol. 55(3) (2001), pp. 239-249; A. Sanchez-Mazas, *The Berbers of North Africa: genetic relationships according to HLA and other polymorphisms* in Arnaiz-Villena, A., eds. *Prehistoric Iberia: Genetics, Anthropology and Linguistics*, (2000), pp. 65-77; J.-M. Dugoujon, O. Lemaire, E. Guitard, A. Sevin, G. Larrouy, P. Moral, B. Sabir, A. Baalia and M. Cherkaoui, *Diversité des allotypes des immunoglobulines (systèmes Gm et Km) d'une population berbère de la vallée de Tacheddirt* (High Atlas, Morocco). Comparison with other African and European populations and history of people's settlement in North Africa, Bulletin and dissertation of the Society of Anthropology of Paris, (2001-2), <http://bmsap.revues.org/913>

⁴ D. RIVET, *op.cit.*, p.36.

Moroccans speak “*darija*”, Arabic dialect or Moroccan dialect spoken by two thirds of the population. “*darija*” is an oral language, not used in writing. National languages are standard Arabic in both its classical and modern form. Yet, public television and written media (with the exception of one magazine and two newspapers) use standard Arabic which 40% of the population understand, and French, elite language which only 10% of Moroccans understand. According to *Mapping Digital Media*, the choice of language restricts access of a large portion of the society to public television. For the illiterate, to whom television is the main source of information and entertainment television programmes are not all accessible.

As for French, it is indeed a common language, by historical legacy, just like Spanish in the North of Morocco for the same reason (French and Spanish Protectorates).

A large part of the population seems to have abandoned Amazigh languages in favour of Arabic. According to Jacques Rivet, “may be half the population spoke Berber at the beginning of the 20th century, around one third at the last census of 2004, but with a much higher proportion of bilinguals than one century earlier”¹. For political reasons, under Hassan II, the State associated Amazigh culture to panarabism; hence the predominance of Arab culture and identity. Amazigh culture and its different forms of expression have now a minority status and have for a long time been ignored, leading to the emergence of defensive community movements which claimed greater recognition of Amazigh language and of Berber contribution to Moroccan history and culture and called for a fair representation in the media. King Mohamed VI responded favourably to these claims. In his address to the nation on 9th March 2011, introducing the new constitutional reform, he stressed “*the constitutional recognition of plurality and of united Moroccan identity, enriched by the diversity of its tributaries, at the heart of which figure the Amazigh people who offer a common heritage to all Moroccans, without exception*”².

The new 2011 Constitution defines the Kingdom of Morocco as a constitutional, democratic, parliamentary and social monarchy. Islam is the religion of the State and Arabic its official language. Similarly, Amazigh is an official language of the State as a common heritage to all Moroccans without exception³. The Royal Institute for Amazigh Culture (IRCAM) was founded in 2003 to safeguard and promote Amazigh language and culture in all its forms and expressions.

A bipartisan committee was created in 2006 and included the Ministry of Communication and IRCAM. It endeavored to develop a global approach aiming at reinforcing the status of Amazigh language and culture in public broadcasting and highlighted the need to create an Amazigh television channel. After much procrastination and many delays, the eighth public television channel, Tamazight TV was created on 1st March 2010⁴.

In terms of equality and gender equity, women’s civil status in Morocco does not reflect the constitutional rights that women are granted. Despite past gains of voting rights, the right to manage business and to apply for public service, personal status law establishes for women the patriarchal model under which women’s role is restricted to reproduction. As a result of a long

¹ D. RIVET, *op.cit.* p.36

² “Full address by HM the King to the nation”, 9 March 2011, <http://www.maroc.ma/NR/rdonlyres/00002015/pisgmllvmaxpxxbirtputaflwnownkc/Texteint%C3%A9galdudiscoursadress%C3%A9parSMleRoi%C3%A0laNationmercredi09mars.pdf>

³ The Constitution ; edition 2011, (articles 1- 3 and 5), Kingdom of Morocco, General Secretariat of the Government, Executive Management of Printing Office: <http://www.sgg.gov.ma/constitution2011Fr.pdf>

⁴ At its creation, Tamazight TV had a budget of 500 million MAD for the period 2010-2013; http://www.cjb.ma/images/stories/TV_Tamazight.pdf

struggle led by feminist associations, the *Moudawana*¹ reform of the personal status finally grants, protects and guarantees women's rights².

- *Media coverage of socio-linguistic issues*

Before Amazigh TV was launched and in accordance with article 49 of the law on audiovisual communication, the two public broadcasting channels Al Oula and 2 M aired the news report in the three Amazigh dialects: Tarifit, Tachelhit and Tamazight. The two channels designed and aired many programmes on Amazigh culture.

In order to examine the representation of linguistic and social/identity issues in public broadcasting media in Morocco, B. Zaid³ carried out a quantitative analysis of programme content in the two main channels Al Oula and 2M. The study is based on observations concerning access and participation in public television. The two findings are likely, among other things, to give indication on the type of guests invited to the programmes, the languages used and the representation of gender equity on television. The 78 programmes used for the study are local productions (including info magazines, documentary programmes, game shows, reality shows) and spread over one year, from January 2007 to January 2008.

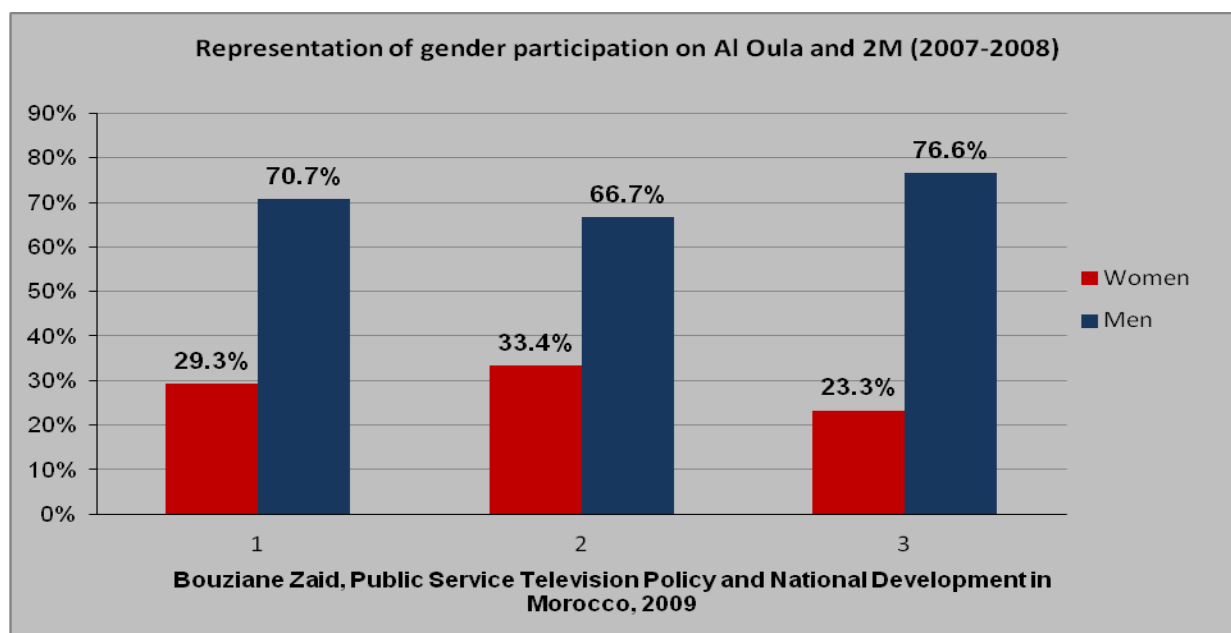
On the 78 programmes reviewed, 33 do not invite women against a single one *Sihatouka Koula Yawm* (Your daily health), which does not invite men. Besides, *Al Oula Hiwar* and *Moubachatan Maakoum* of 2M, two high-audience programmes have not invited any women.

In total, the programmes of both channels tend to invite more men than women, a rate of 70.7% men against 29.3% women. As for the channel Al Oula, the rate of women's participation is 23.3% against 76.6% of men's participation. As for 2M, whereas women's participation rate is 33.4%, relatively higher than in Al Oula, men's participation comes much higher and reaches 66.7%.

¹ *The Moudawana* reform in Morocco, File : Women's status, Press review (March 2003 - November 2004), Centre of Documentation IMED Rome: [http:// www.paraenam.org](http://www.paraenam.org)

² Hayat Zirari, *Société et culture /développement et coopération: Droits des femmes au Maroc : bilan et perspectives*, Med 2010, http://www.iemed.org/anuari/2010/farticles/Zirari_femmes_fr.pdf

³ Bouziane Zaid, *Public Service Television Policy and national development in Morocco*, 2009, University of South Florida (USF), Scholar Commons, *Graduate School Theses and Dissertations*: <http://scholarcommons.usf.edu/etd/100>

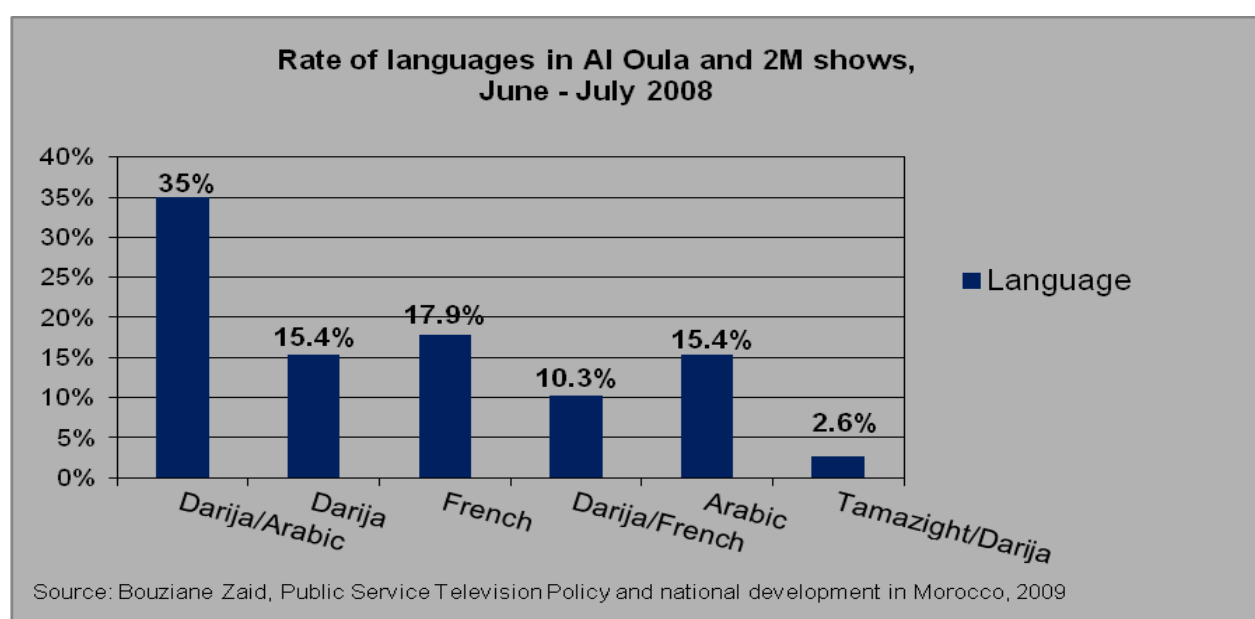
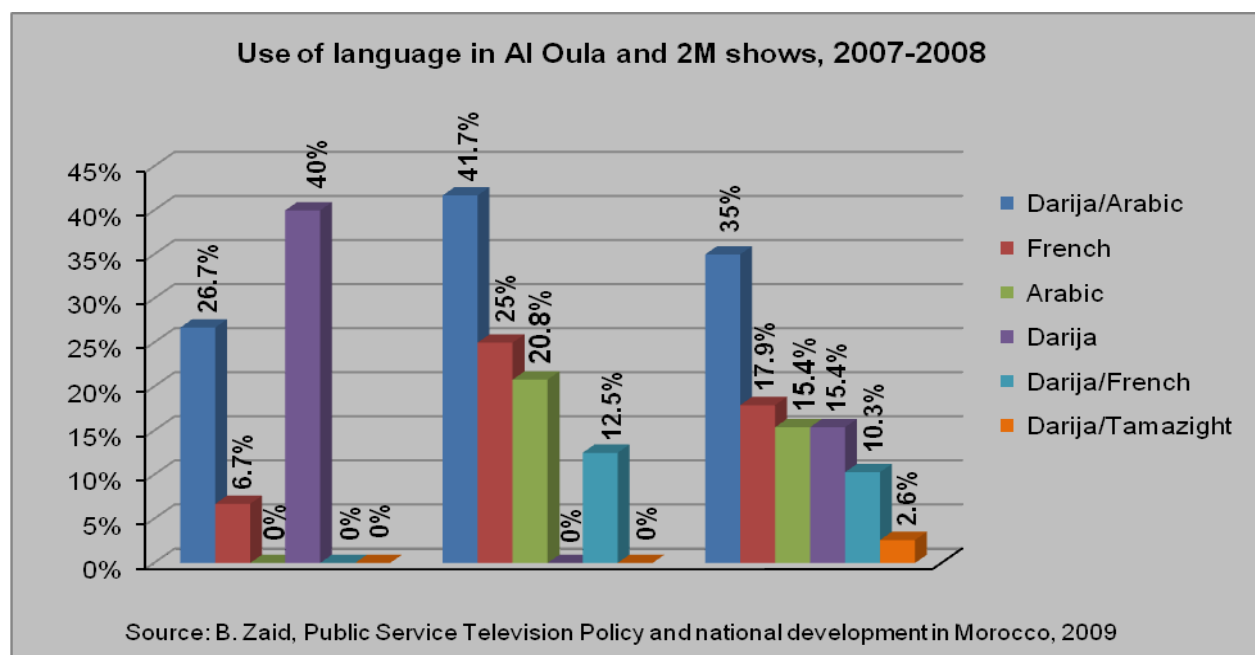


As shown in the analysis by B. Zaid, gender equity in media does not reflect the demographic reality in the kingdom. According to this representation, women in public media participate at a rate of less than one third of guests invited on television. Yet the census of Moroccan population, as published by the High Commissioner for Planning indicates that in 2009, the proportion of women in the population is 50.7%¹.

- Language use on public television

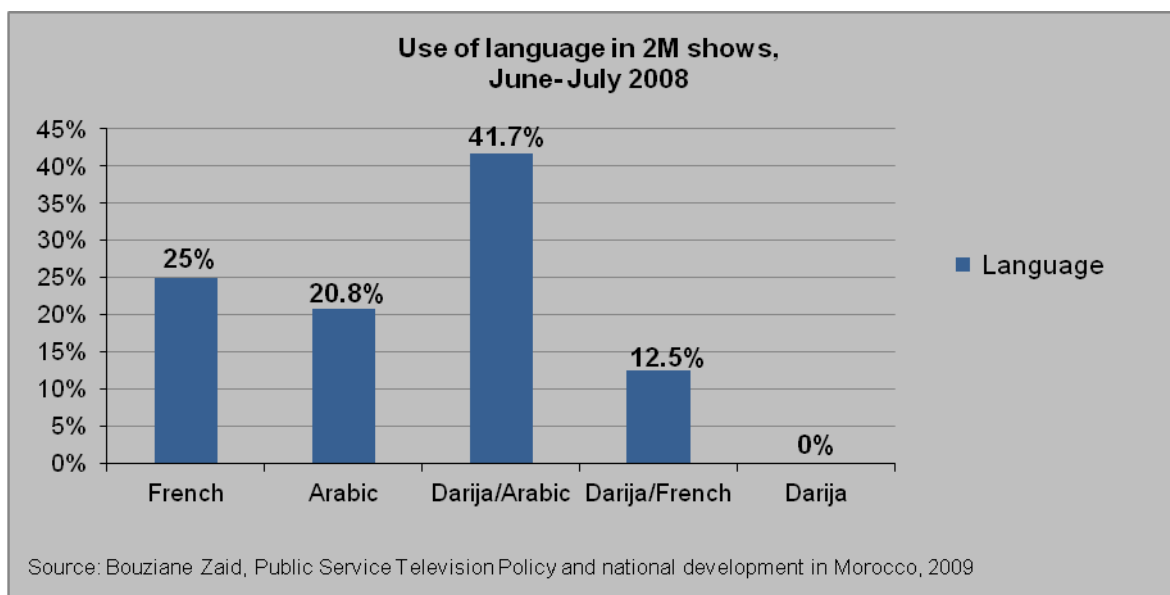
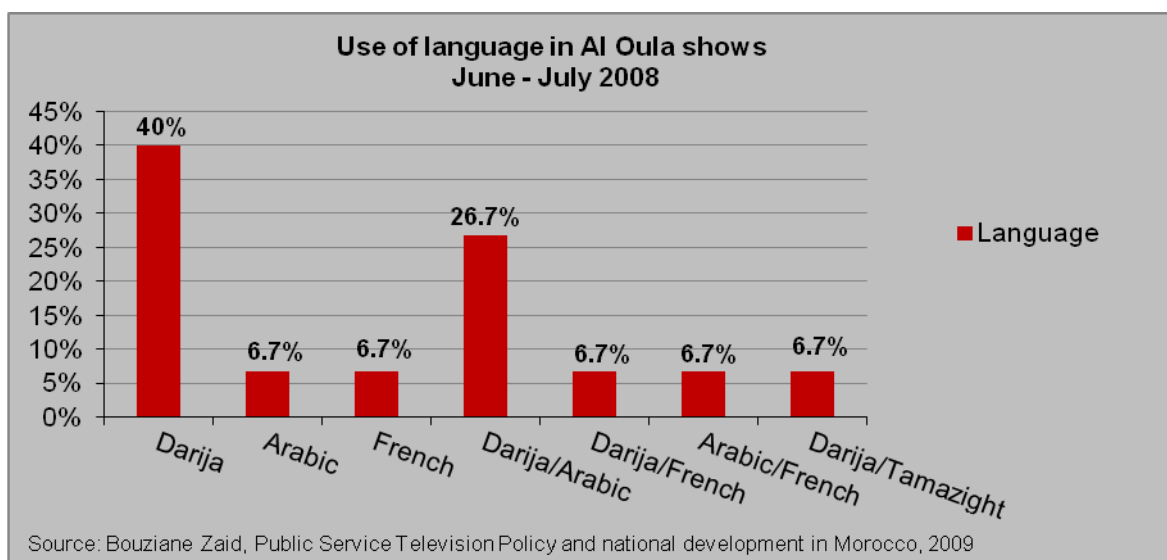
The findings of the study on the languages used on both channels show that the highest rate is for the use of a mixture of darija and Arabic with 35%, 17.9% French, 15.4% modern standard Arabic, 15.4% darija, 10.3% a mixture of darija and French and 2.6% of programmes use a mixture of Tamazight and darija.

¹ *Démographie : Femmes et Hommes en chiffres 2010*, High Commissioner for Planning, RGPH, http://www.hcp.ma/downloads/Demographie_t11876.html



According to the same study, it is interesting to note that while a mixture of darija and Arabic gets the highest rate of 35%, the following one is that of Arabic or French at 33.3%. What is even more striking is that the number of programmes using French exceeds that of programmes using darija or Arabic separately. While 7 programmes are in French, six are in Arabic and only two in darija.

In this context, it is important to note that the percentage of languages used in programmes differs according to channels. Al Oula programmes use more darija than 2M's. 40% of Al Oula programmes use darija, 26.7% a mixture of Arabic and darija and 6.7% of content is in French. However, 41.7% of 2M programmes use a mixture of Arabic and darija and 25% are in French. But 2M has no programme exclusively in darija.



According to the study, the choice of language restricts access and participation in public television to a large portion of the society. The choice of language benefits the most affluent and most highly educated in the society. 43%¹ of the population of the age of ten and above is illiterate. 30.3% read and write Arabic and French. 17.3% read and write Arabic only².

¹ High Commissioner for Planning, Census ; http://www.hcp.ma/Recensement-general-de-la-population-et-de-l-habitat-2004_a633.html

² Ibid, also quoted in: Bouziane Zaid, *Public Service Television Policy and national development in Morocco*, op.cit, p.54

5.5. Public television service

5.5.1. Television channels

5.5.1.1 SNRT channels

The Moroccan television landscape consists of 10 national public channels. The National Radio and Television Company (SNRT) formerly Moroccan Television and Radio (RTM), pursuant to Law No. 77-03 on audiovisual communication, is a company under Moroccan law with a capital totally owned by the State.

For this reason, and in accordance with articles 1 and 47 of this law, SNRT is a national broadcasting company, of the public sector of audiovisual communication. SNRT is financed by State grants, advertising revenues and the tax for promoting national audiovisual landscape (TPPAN)

It should be noted that a project of a parliamentary channel has been under discussion since 2005. The channel would broadcast live sessions of Parliament and organize discussion programmes on social and political issues and on legislative proposals. SNRT currently has eight public channels which aim at promoting and preserving the national audiovisual heritage through their programmes. They offer a range of programmes reflecting a willingness to meet the needs of a composite audience in the field of culture, information, service and entertainment. The channels are the following:



Al Aoula

Formerly TVM; it is a general-interest channel of public service which offers varied programmes covering at once information, entertainment, sports and culture. It aims at meeting the needs of TV viewers in Morocco, the Arab world and Europe in the best possible way.



Laayoune TV

It was launched in November 2004. It is the first regional channel in the Maghreb with programmes dominated by information covering a wide range of topics from politics to sports, education, religion and social issues. Laâyoune TV is meant to reflect local interest and covers all southern provinces



Arryadia is a 100% sports channel with the ambition of becoming the top channel of Moroccan sports. The channel is interested in all sports practiced in Morocco and covers all national sports events and international sports news.



Arrabia or the channel of knowledge and culture; It endorses an educational role. Its cultural magazines and entertainment shows reflect its endorsement of a didactic role carried out by coaching the target populations. The channel is also interested in raising awareness on social issues and in enlightening on the institutions of the State.



Al Maghribia is a satellite channel addressed to Moroccan residents abroad. This channel repeats part of El Aoula programmes and part of 2 M's. It is accessible only by satellite.



Assadissa is the Mohammed VI channel of the Holy Koran. It is a religious theme-based channel focused on providing knowledge of the teachings of Islam to a large audience.



Aflam TV is the latest satellite channel of SNRT broadcast exclusively on TNT. It is entirely dedicated to fiction with national and international programmes in digital quality round the clock. Aflam TV aims at stimulating public taste for cinema and at being an instrument for national production.



Tamazight TV Its programmes are varied and general-interest. Most are in Amazigh, intended to meet needs of information, culture, education and entertainment of the largest number of Amazigh-speaking Moroccans.

5.5.1.2 SOREAD-2M channels

The second broadcasting company of Moroccan public pole service, SOREAD 2M, includes the following channels:



2M offers varied and general-interest programmes to meet the needs of culture, education and entertainment of the largest possible audience.



2M satellitaire offers programmes to foreign audiences and to Moroccans abroad, which are not full and simultaneous repeats of television service on the national territory.

5.5.1.3 Mixed economy channel : Medi 1 TV

Medi 1 TV is the only Moroccan television channel owned in majority by the State as well as private share holders.



Medi 1 TV

It broadcasts on national territory by terrestrial and/or digital analogue and offers programmes focused on information, national events, Maghreb and Mediterranean news, with an opening on international news.

5.5.2. of SNRT achievements in 2010

- Launching of Tamazight
- Broadcasting of over 48,000 hours of television time and 57,728 hours of radio air time; a combined total of 105,728 hours for TV and radio
- Broadcasting of 28 hours of national production, in first transmission, on all the TV channels.

5.5.2.1 Air time and variety of programmes on SNRT channels

Services edited by SNRT	Achievements in 2010
AL AOULA	<ul style="list-style-type: none"> • Main sponsor of national audiovisual production • Launched the production of the first "Telenovelas" of the history of national audiovisual communication, consisting of 120 episodes to be released in 2011 • Production of 234 hours of fiction • Broadcasting of 1,180 hours in the time slots of its news reports and over 272 hours of information magazines • Broadcasting of 285 hours of films, TV fiction, series, sitcoms, etc., a completion rate of 143% • Social magazines 77 hours • Information magazines 1,452 hours • Religious programmes 172 hours • Cultural and documentary programmes 1,216 hours • Sports programmes and game repeats 167 hours • Service programmes 213 hours • Childhood, teenage and youth programmes 675 hours • Musical and entertaining programmes 122 hours • Domestic fiction 187 hours • International fiction 1,583 hours
ARRYADIA	<ul style="list-style-type: none"> • Promoting domestic sports and meeting TV viewer expectations. • Fulfilled its commitment to purchase sports rights. • Broadcasting of a total of 4,600 hours against 4,700 in 2009. • 416 hours of internal production and 420 hours of external production out of an annual total of 836 hours of broadcasting.
ARRABIA	<ul style="list-style-type: none"> • Domestic broadcasting of 14 programmes covering all specifications, out of a total of 1,253 hours (including 77% produced internally and 23% externally). • Over 42% of the hourly programme volume dedicated to tutoring and learning, or 526 hours, against 40% in 2009 with a total of 437 hours. • Broadcasting of 908 hours of purchased programmes or 480 hours dedicated to learning, i.e. 53% of global hourly volume in 2010, against 840 hours of purchased programmes in 2009 including 412 hours dedicated to learning out of a global rate of 49% of timetable.
AL MAGHRIBIYA	<ul style="list-style-type: none"> • Installed four daily news reports produced by Al Maghribiya and broadcast at: 9 am, 12, 3 pm and 6pm. • Broadcasting of 110 hours of cultural magazines.
ASSADISSA	<ul style="list-style-type: none"> • Increased programming with new programs dedicated to explaining the Holy Koran and Hadith and showing special programs during Ramadan and Hajj. • Producing a cartoon series dedicated to El hajj rituals, 6 new programs of awareness raising and a series of religious songs.

	<ul style="list-style-type: none"> • Broadcasting of religious programs in French and Amazigh.
AFLAM TV	<ul style="list-style-type: none"> • Coverage of the 10th edition of the international film Festival of Marrakech. • Broadcasting of 831 hours in 2010 against 835 hours in 2009, 60% for international cinema, 13% international TV films, 12% for Arab cinema, 6% for Hindu cinema, 6% for Moroccan cinema and 3% dedicated to Moroccan theater. • Sustained advertising by print media, advertising agencies, communication agencies and Media agencies.
TAMAZIGHT CHANNEL	<ul style="list-style-type: none"> • Contribution to domestic production with 585 hours and a rate of achievement of 116 %. • Broadcasting starts at 2pm instead of 6, or 4 hours of daily broadcasting (a total of 1,080 hours). • 400 hours of internal production and 362 hours of external production out of an annual total of 762 hours of broadcasting. • Broadcasting of 1,000 hours or 31% of programs dedicated to young audiences, 15% to entertainment and music, 12% to cultural programs, 11% to religious programs, 6% to educational programs, and 5% to sports programs.
LAAYOUNE TV	<ul style="list-style-type: none"> • 395 hours of internal production and 119 hours of external production out of an annual total of 514 hours of broadcasting.

Source: *La mise à niveau du paysage audiovisuel marocain*, (Upgrading Moroccan audiovisual landscape) Division of Audiovisual Media, Cinema and NTI/Department of Media Studies and Development/Ministry of Communication, op.cit, pp 19-20.

5.5.3. SOREAD 2M achievements in 2010

Apart from achievements in terms of program variety and air time covered by SOREAD 2M channels, object of the following table, the portal 2m.ma is part of the company's achievements in 2010.

5.5.3.1 The portal 2m.ma

- Launching of the new website www.2m.ma
- Number of visits increased 10 times, from 715,125 in 2009 to 7,422,448 the last 8 months of 2010.
- Posting of all programs produced by 2M or in rights (films, series, sitcoms, magazines, entertainment, news, briefs...).
- Partnership agreement with video hosting website Dailymotion where all videos, except news programs, are available.
- Broadcasting of the evening news (8.45pm) authorized on the website of the foundation 'education and culture' of the popular bank, for the benefit of Moroccans living in France.
- Official page of the channel created on the social website, (20,000 fans since September 2010).

5.5.3.2 SOREAD-2M air time and program variety

Services edited by SOREAD 2M	Achievements in 2010
2M /2M Monde	<ul style="list-style-type: none"> • Number of hours of domestic production, as first transmission: 1,818 hours against 1,583 hours in 2009, 1,745 hours in 2008, 1,635 in 2007, 1,610 en 2006, 1,567 in 2005, 1,470 in 2004 and 1,300 in 2003. • Share of domestic production was around 47% of total air time in 2010 against 54% in 2009, 41.72% in 2008, 41% in 2007 and 2006, 36 % in 2005 and 30% in 2004. • Share of programs in Arabic, Amazigh and Moroccan dialects: 77.03% in the language distribution of global air time against 71.08% in 2009 and 2008, 65% in 2007, 60% in 2006 and 55% in 2005. • Domestic audiovisual production in first broadcasting is 4hrs 47mns per day, in annual average, which is a higher presence than the specifications requirements (4hrs). • Exceeding of specifications requirements in both hourly broadcasting volume and number of showings, all programs included. • Coverage and broadcasting of 1,537 information programs including 1460 news programs, 52 magazines of general and political information and 29 parliamentary magazines. • Broadcasting of 330 hours of original audiovisual works : <ul style="list-style-type: none"> • 15 television fiction in Arabic (21 hours). • 6 Series broadcast entirely or partially (60hrs 30mns). • 10 plays (15hrs). • 57 documentary units (26hrs 48mns). • Broadcasting of films with 11 feature films and 15 short films including one in Amazigh. • Production or purchase of new audiovisual works (TV fiction) with a budget of 49,445,400 MAD incurred during 2010 which benefited around fifteen different production companies. • Production and coproduction of new documentary programs and

	<p>magazines with a budget of 54,547,000 MAD, works assigned in whole or in part to around twenty separate production companies.</p> <ul style="list-style-type: none"> • Productions in Amazigh (works of fiction and other) with a budget of 8,615,000 MAD which benefited around ten different production companies. • Coproduction or purchase of broadcasting rights for the production of 4 new feature and short films with a global budget of near 2,970,000 MAD. • Contribution to promoting and supporting domestic sports with a budget of over 3% of net advertising turnover of previous year.
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Source : Ibid, pp. 21-22

5.6. Contribution of public broadcasting companies to domestic film production

SNRT contributes to the production of Moroccan films. It contributes in the form of coproduction input (in cash or industry) or purchase of broadcasting rights, to the domestic production of at least 20 Moroccan feature films and 20 Moroccan short films every year. (*Specifications SNRT, article 14*)

SOREAD-2M contributes to the production of Moroccan films. It contributes in the form of coproduction input (in cash or industry) or purchase of broadcasting rights, to the domestic production of at least 10 Moroccan feature films and 10 Moroccan short films every year¹. (*Specifications SOREAD-2M, article 14*)

¹Ministry of Communication, *La Production Audiovisuelle et Cinématographique Nationale: État des lieux et Perspectives, note introductive aux assises nationales de la production audiovisuelle et cinématographique*, July 2006; <http://www.mincommunication.ma>

5.7. Financing of public broadcasting

The public sector in Morocco benefits from mixed funding primarily based on State funding and advertising revenues.

In fact, funding of the national audiovisual sector occurs through the Fund for promoting national audiovisual landscape (FPPAN) which draws its resources from fees collected on electricity bills.

The second financing source is the State budget allocated to the sector. This approach ensures regular funding to public media. The last financing mode rests on advertising resources.

5.7.1 Financing by State recourse

5.7.1.1 Fund for promoting national audiovisual landscape (FPPAN)

It was set up in July 1996, and is included in the Finance Law of 2005. It is aimed at serving as a finance and development support tool in the domestic audiovisual sector, under the control of the minister in charge of communication¹.

The system aims primarily at giving a new impetus to domestic production in the audiovisual and film sector. FPPAN acts in a context marked by the increasing number of offers made by foreign televisions through digital satellites and by the new liberalization process and its promising prospects with the arrival of new operators on the scene.

FPPAN is supplied by :

a) *The tax for promoting the national audiovisual landscape (TPPAN)*

TPPAN was created on 1st July 1996 at the expense of subscribers to the electricity network for domestic or commercial use (Article 16 of Finance law for the fiscal year 1996-1997).

The proceeds of the tax are allocated up to:

- 60% to the National Broadcasting and Television Company;
- 40% to the special purpose account No. 3.1.09.02 called Fund for promoting national audiovisual landscape².

b) *Tax on broadcast advertising (TPR)*

- ⇒ From 1st July, article 20 of Finance law No. 14-97 for the fiscal year 1997-1998, established an annual tax on radio and television advertising, broadcast from Morocco;
- ⇒ The tax rate is set at 5% of revenue, net of taxes, made by the agencies planning the advertising campaigns on the airwaves of radio stations and television;
- ⇒ The proceeds of payments are allocated to the Fund for promoting national audiovisual landscape.

FPPAN resources are allocated on one hand in the form of grants, investments and support funds granted to the national broadcasting and production companies, or on another, in the form

¹ Dahir No. 1-96-77 of 12 Safar 1417 (29 June 1996) for enacting Finance law No. 8-96 for the fiscal year 1996-1997, Opening of a special purpose account No. 3.1.09.02 called : Fund for promoting national audiovisual landscape ; http://www.haca.ma/html/dahir_1_96_77_fonds_pam.htm

² *La mise à niveau du paysage audiovisuel marocain (Upgrading Moroccan audiovisual landscape)*, op.cit., pp. 15-16

of direct investment expenditures related to general studies and to outreach campaigns and training programs.

Program contracts signed by the government and national companies of public broadcasting, in accordance with article 51 of law 77-03 on audiovisual communication lead to funding the public pole.

In this perspective, the Ministry of Communication established program contracts respectively binding the government to SNRT and to SOREAD 2M. Under the 2006-2008 contracts, an amount of around 1,170 million DH of general State budget was dedicated to SNRT, in addition to amounts of 556 million DH through the Fund for promoting the national audiovisual landscape and 820 million DH as part of the company share in the tax for promoting the audiovisual landscape¹.

The program contract State-SNRT for the period 2009-2011 and signed on 2nd October 2009 provided for a lucrative investment estimated at no less than 650 million DH. In this framework, the State commits to pay a contribution to SNRT of 2.9 billion DH, which is an additional contribution of 900 million compared to what was previously provided for under the former contract (2006-2008)².

Concerning SOREAD 2M, the first contract of this kind binding it to the State dated 11th June 2010 covers the period 2010-2012. Under this contract, the State committed to pay SOREAD 2M an amount of 250 MAD³.

5.7.1.2 Advertising revenues

In Morocco there are many advertising investment sources: GAM (Morocco Advertisers' Grouping)⁴, SNRT advertising board⁵, Imperium Media Company. Data is also available on *Arab Media Outlook*⁶ published by Dubai Press Club which provides statistics for the various Arab countries.

The Moroccan advertising market is a young field with latent potential in which partners, advertisers, and advertising boards engage in a harsh competition over modest market shares. The most significant growth of the Moroccan advertising market occurred in the telecommunications sector, because of the intense competition between the three operators. According to GAM, the Moroccan advertising market had a 20%-increase between 2006 and 2008. The market decline in 2009 that reached minus 0.9% is a direct reflection of the global economic context⁷. The Moroccan advertising market ran again into uncertainty in 2011 after its strong recovery in 2010. With 4.3 billion MAD, the total amount of media investments shows a

¹ <http://www.mincom.gov.ma/MinCom/Fr/Actualites/>

² « Public institutions: Over 111 billion DH in markets ; What about SNRT ? » www.leconomiste.com

³ *Report on the sector of public institutions and companies, Budget Bill for the fiscal year 2011*; <http://fr.scribd.com/doc/53243178/32/AUDIOVISUEL-SNRT-et-SOREAD-2M>

⁴ <http://www.gam.co.ma/> Website not accessible in February 2013.

⁵ <http://www.snrt-publicite.ma/>

⁶ *Arab Media OutLook 2009-2013*, Inspiring Local Content, Forecasts and analysis of Traditional and Digital Media in The Arab World, Dubai Press Club, UAE ; <http://www.fas.org/irp/eprint/arabmedia.pdf>

⁷ *The Report Morocco 2011*; http://books.google.co.uk/books/about/The_Report_Morocco_2011.html?id=ncqqQra-2ToC

small drop of -0.4% mainly due to the sharp drop in revenue from television advertising¹. GAM believes that public broadcasters have won one third of the 6 billion MAD advertising revenue in 2011; and that 2.3 billion MAD (206,269,000 million EUR) were invested in TV passages with a decline of 800 million MAD (71,745,900 million EUR) compared to 2010.

According to the same source, 2M advertising revenues leaped from 1.4 billion MAD in 2007 (121,737,000 million EUR) to 2 billion (177,918,000 million EUR) in 2010. The advertising turnover of Al Oula went during the same period from 517 to 641 million MAD (57,022,600 million EUR). Medi TV advertising revenues increased more than fourfold and amount to 84 million MAD (7,472,540 million EUR) in 2010².

Internet advertising revenues have more than doubled between 2008 and 2009 due to the continuous increase in broadband subscriptions since 2003. According to the report there should be an increase in advertising spending on Internet reaching 45% of TCAM between 2009 and 2013, the highest growth rate of all platforms of the advertising market of the Kingdom.

According to Imperium Media, the telecommunications sector is the first investor in advertising in Morocco.

Top ten of Advertisers/Investors- All sectors combined

Advertisers	Gross investment (till end of October) (in thousands MAD)	Market share
Maroc Telecom	443.500	9.50%
Meditel	332.440	7.10%
Wana Corporate	300.830	6.40%
Procter & Gamble Maroc	130.560	2.80%
Centrale Laitière	120.090	2.60%
Unilever Maghreb	78.340	1.70%
Coca-Cola	70.260	1.50%
Fromagerie Bel Maroc	64.220	1.40%
Lesieur Cristal	58.200	1.20%
Addoha	53.150	1.10%
Total Investment / Market	4.684.500	

Source: Imperium.³

According to *Arab Media Outlook*, the advertising market of print media is relatively small in Morocco, amounting to less than 15% of its total estimated value in 2009 at 284 million USD⁴ or 198,140,000 EUR. National television channels are the dominant advertising platform with

¹ "Le marché publicitaire marocain en 2011 : spécificités et opportunités", *Marketing au Maroc*, 17 January 2012. <http://www.marketing-au-maroc.com/le-marche-publicitaire-marocain-en-2011-specificites-et-opportunités/>

² Boudarham Mohamed, « Télévision. Les milliards de la pub », *Tel Quel*, 8 May 2012; <http://www.telquel-online.com/Actualites/Economie/Television-les-milliards-de-la-pub/521>

³ Quoted in "Investissements publicitaires : la télé en perte de vitesse", 30 November 2011, <http://www.leconomiste.com/article/889132-investissements-publicitaires-brla-tele-en-perte-de-marche>

⁴ *Mapping Digital Media : Morocco*, op.cit., p. 65

around 60% of total market expenditure. Television advertising expenditure shows an increase of about 9% in 2009. The increase is largely due, according to *Arab Media Outlook 2009-2013*¹, to the development of the Moroccan television sector. The share of advertising revenue in the radio sector keeps its rate of 5% of the whole market, made in 2009. According to the report, that rate should rise to 6% over the whole projection period 2009-2013.

According to SNRT, quoted by Maroc Press² the recession of 2011 continued during the first four months of 2012: *“There has been a sharp decline during the first four months of 2012 with an overall turnover (excluding advertising investments on the net) of 1.6 billion DH, against 1.8 billion at end April 2011, a dip of 12%!”*.

“On the basis of the figures provided by the advertising board of the National Radio and Television Company (SNRT), confirmed by the professionals of the sector, advertising revenues of the radio, press and television all at once, declined compared to 2011. The most affected are the radios where the advertising volume fell by 32%, followed by print media where the decline is of 12% and televisions which lose 10%. Only posting gets by, with even a small increase of 1%.

Moreover, this sector is for the first time ahead of television in terms of investment. In fact, its turnover went up from 488 million dirhams in the first four months of 2011 to 493 million dirhams in the same period in 2012. The market share for posting increased from 27% to 31% whereas television gains one point only and reaches 29% and print media to 25%. As for radio, it loses 5 points at once.

Concerning television, which is generally spared, the decline of the turnover is justified, according to advertising boards, by some advertisers' budget cuts due to the economic crisis and to operators' wait-and-see attitude. Besides, according to some professionals, the market of television advertising is presently saturated; the turnover being produced on a small number of advertisers. There are presently around 150 to 200 advertisers who account for 80% of the market.

The advertising market in Morocco (2007-2013)

In million USD	2007	2008	2009	2010	2011	2012	2013	CAGR* (09-13)
Newspapers	23	24	24	21	22	24	26	2.1%
Television	128	154	167	190	209	230	253	11%
Magazines	18	18	18	15	14	16	17	-1.4%
Out-of-home (includes cinema)	50	57	58	64	70	78	85	10%
Radio	12	14	15	16	18	19	19	6.0%
Internet	0	0.9	1.9	3.1	4.5	6.2	8.2	45%
Total	231	268	284	309	338	373	408	9.6%

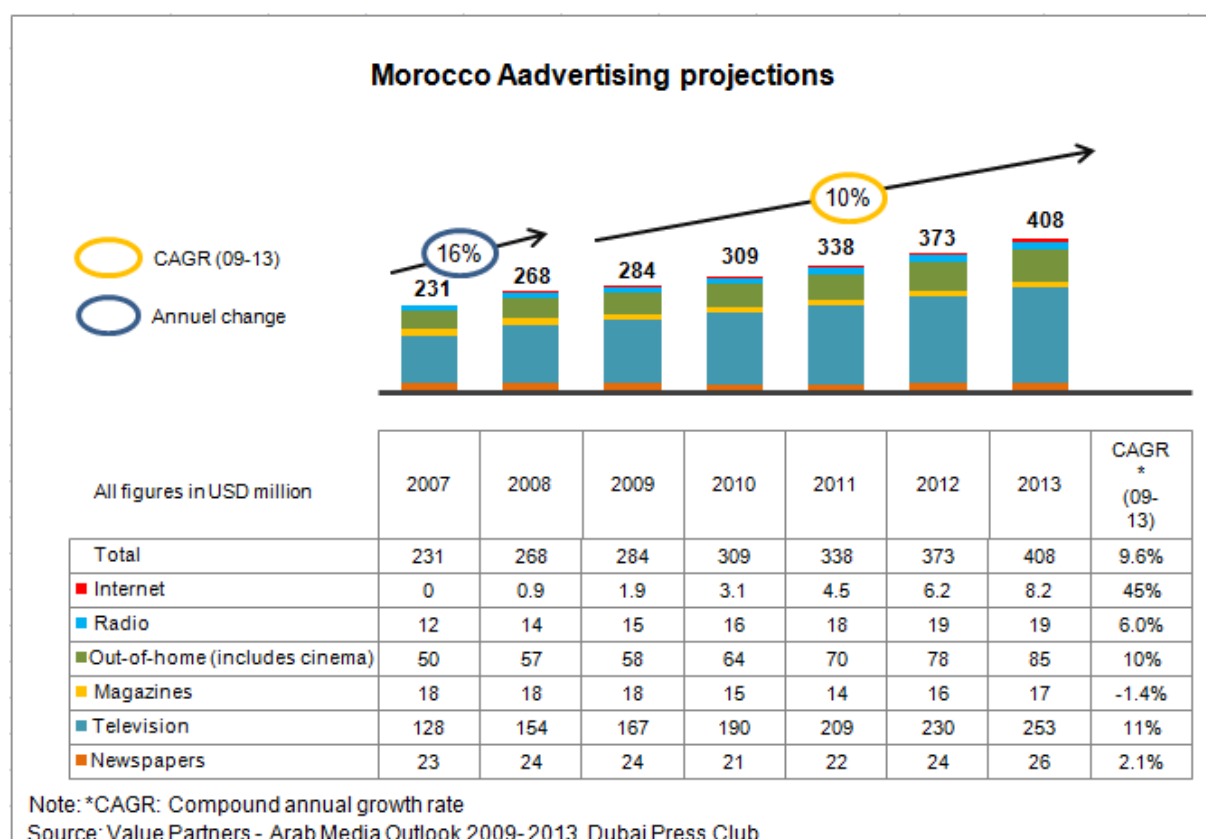
Source: Arab Media OutLook, 2009-2013, Dubai Press Club, 3rd edition, UAE.

¹ *Arab Media OutLook 2009-2013*, Inspiring Local Content, Forecasts and analysis of Traditional and Digital Media in The Arab World, Dubai Press Club, UAE ; <http://www.fas.org/irp/eprint/arabmedia.pdf>

² *“Le marché de la pub boit la tasse : 12% de baisse pour les 4 premiers mois”*, Maroc Press, 5 June 2012.

The recent development of the television advertising market goes hand in hand with the launching of IPTV by Maroc Telecom in 2006, and the introduction of TNT covering 77% of the population in June 2007. In the same context, SNRT expects to complete its transition to digital in 2015.

Taking such developments and structural changes in Moroccan television into account, *Arab Media OutLook* expects progression in the advertising television market to reach more than 10% of CAGR in the projection period 2009-2013.



5.8. Reforming SNRT and SOREAD-2M terms of reference

The issue of reforming specifications has been the most debated, and led to the dismissal of HACA President by the King.

On 29th March 2012, in response to the request by the Head of Government, the Higher Council for Audiovisual Communication (CSCA), part of HACA, adopted rulings No. 13-12 and 14-12 approving the specifications set by the Government governing the activities of the National Radio and Television Company (SNRT) and SOREAD-2M.¹

The revision of specifications immediately generated controversy, including among the majority in government, and if we are to believe the media, required royal intervention². The revision of specifications included, among other things, the ban on advertising for gambling, the obligation to broadcast the five calls to prayer and the broadcasting of programmes on the public channels in Arabic. Opponents believed that the implementation of these measures, along with the absence of competition with private channels, affected the Moroccan audiovisual landscape. Besides, the dominance of satellite channels in Arabic lead Moroccan viewers in fact to abandon national channels in favour of Arabic speaking channels³. The controversy led to the dismissal of HACA President, Mr. Ahmed Ghazali, on 13th May 2012, blamed by his opponents for having too quickly accepted the conditions required by the Government⁴.

Following this crisis, the King appointed Mrs. Amina Lemrini Elouahabi as President of HACA and the Higher Council for Audiovisual Communication, and Mr. Jamal Eddine Naji Director General of audiovisual communication. After a first rejection in September 2012, on 15th October 2012, HACA finally adopted SNRT and SOREAD-2M new specifications as proposed by the Government, in an amended version.

According to the statement of the Minister of Communication, M. Mustafa Khalfi⁵, *"HACA decision complements the procedure of developing and adopting specifications of the audiovisual sector in accordance with article 49 of the Law on audiovisual communication and is the result of a fruitful cooperation and synergy between the various stakeholders in this process."*

¹ <http://www.mincom.gov.ma/fr/actualites/item/483-le-csca-approuve-les-cahiers-de-charges-de-la-snrt-et-de-soread-2m.html> ; <http://www.maroc.ma/PortailInst/Fr/evenements/Nouveaux+cahiers+des+charges.htm>

² According to Panorama Maroc, on 21st August 2012, *"The record of the specifications was finally closed following the royal audience granted to Benkirane with his Minister of State Abdallah Baha and his Minister of Communication, Mustapha el Khalfi; during this meeting, the King expressed his reservations about certain provisions of the specifications, mainly about the part on religion, which is within the powers of the King. Mohammed VI also expressed his disapproval with reducing the programs in French ; following this audience, a ministers committee was formed and assigned to the former Minister of Communication Nabil Benabdallah, presently in charge of Housing, to introduce amendments to the points of the specifications which are subject to dispute."* <http://www.panoramaroc.ma/fr/benkirane-et-lentourage-royal-premier-choc-premiers-affrontements/>

³ Latifa Taya, in charge of programs at Panos Institute, Paris. « La réforme audiovisuelle marocaine vivement contestée », by RFI, Zéphyrin Kouadio, 13th April 2012; <http://www.rfi.fr/afrique/20120413-reforme-audiovisuelle-marocaine-vivement-contestee>

⁴ "Ghazali and Reghay dismissed from HACA and replaced by Amina el Ouahabi and Jamaledine Naji", *Panorama Maroc*, 11th May 2012, <http://www.panoramaroc.ma/fr/ghazali-et-reghay-limoges-de-la-haca-et-remplaces-par-amina-el-ouahabi-et-jamaledine-naji/>. See also, "Amina Lamrini and Jamal Eddine Naji, new officers at HACA: Lessons from a dismissal", *Libération*, 12th May 2012. , http://www.libe.ma/Amina-Lamrini-et-Jamal-Eddine-Naji-nouveaux-responsables-de-la-HACA-Les-lecons-d-un-limogeage_a27296.html

⁵ <http://www.mincom.gov.ma/fr/a-la-une/item/656-la-haca-approuve-les-amendements-apportes-par-le-gouvernement-aux-cahiers-des-charges-de-la-snrt-et-de-la-soread-2m.html>

Article 49 states that the specifications are established by the Government, approved by HACA and published in the Official Journal.

This decision, he added, provides Morocco with a road map to promote the sector of public broadcasting while preserving the gains made over the years. It ensures that all stakeholders contribute to the efforts made to meet the challenges of quality and competitiveness, encourage creativity, develop human resources and mobilize the necessary financial resources. He also added that these goals can only be achieved through the effective application of the principles of good governance.

The Minister indicated that the amendments have highlighted the provisions on good governance, ethics and public service, reinforced those on linguistic and cultural pluralism and openness, and set up adequate measures for a more efficient use of resources. The specifications, he argued, are a 'gain' to Morocco and the 'victory' of all the players in the audiovisual sector, in their mission of public service, adding that this is a first step to be followed by other achievements, including a new programme contract with SNRT and SOREAD 2M, supporting and promoting production and improving quality, and harmonizing training on the basis of the needs of the sector".

5.9. Proposals of the Finance Law of 2013

The government plans to develop the third programme contract with between the State and SNRT and the State and Soread-2M, in accordance with the new specifications being implemented, according to the introductory note of the Finance Law 2013 which outlines were presented at the plenary session of 20th October 2012 by the Minister of Economy and Finance, Nizar Baraka, to both Houses of Parliament.¹

5.9.1. Financial situation and assessment of SNRT achievements in 2011

According to the *Report on the sector of public institutions and companies* which comes with the draft Finance law 2013, the operating deficit of SNRT in 2011 was 173 million MAD and the current deficit was 176 million MAD.

The main goals of the programme contract State-SNRT for 2009-2011:

- To pursue its mission of public service in the fields of information, education and entertainment, targeting the entire Moroccan society;
- To maintain its leading position in the development of radio and television broadcasting, providing a counterweight to the dominance of satellite;
- To consolidate and reinforce national television coverage through a digital network;
- To improve the systems of governance, information and management.

The assesment of achievements in 2011 highlights the following aspects :

- Broadcasting of over 43,723 hours of television time (against 47,000 hours under the programme contract) and 58,723 hours of radio air time (against 52,000 hours under the programme contract) ;

¹« Audiovisuel. Elaboration du 3e contrat programme », *Le Matin*, 3 October 2012, <http://www.lematin.ma/express/Audiovisuel-Elaboration-du-3e-contrat-programme/173243.html>. Documents and reports attached to the draft Finance Law 2013 submitted to both Houses of Parliament on 20 October 2012 http://www.finances.gov.ma/portal/page?_pageid=53,18176064&_dad=portal&_schema=PORTAL

- Broadcasting of 33 hours 30 minutes of national production, in first transmission, on all television channels (against 28 hours in the programme contract);
- Consolidating audience ratings (over 1 out of 3 watched Al Oula in 2011);
- Introducing modern, digital systems in production, transmission and broadcasting.

The performance evaluation of the programme contract State-SNRT 2009-2011 shows that, globally, commitments on both sides have been met.

Actions to improve governance and the internal control system and reorganize staff will be pursued.

5.9.2. Achievements and financial condition of SOREAD-2M in 2011

Concerning SOREAD-2M and in accordance with the provisions of law No.77-03 on audiovisual communication, the State signed a programme contract with SOREAD-2M for 2010-2012 with the following main objectives:

- To maintain the audiovisual communication service to meet public needs for culture, education, information and entertainment. ;
- To contribute to the development of national audiovisual production;
- To improve governance in the company, streamline operating expenses and optimize investments;
- To launch a process of voluntary departures with an estimated cost of 60 MAD.

Main achievements by end 2011:

- 2M TV audience gains stability at around 24.8% with a rise of 0.8 point compared to 2010;
- National production time increases by 2.7% in number of hours, first transmission, or 1,868 hours against 1,818 hours in 2010;
- The share of national production increases by 14% moving to 61% of overall television time in 2011 against 47% in 2010;
- 114 MAD are dedicated in external cost to the production of 8 Moroccan TV fiction, 3 series, 6 domestic feature films and other programmes (including documentaries and magazines).

Concerning the financial state of the company, the financial statements for 2011 lead to the following observations:

- Advertising turnover of 571 MAD against 636 MAD in 2010 (-11.5%);
- A net result of -121.8 MAD against -38.6 MAD in 2010;
- An added value of 252.5 MAD against 317 MAD in 2010 (-20.5%);
- A self-sustainability of -122 MAD against 28 MAD in 2010;
- A balance of 864 MAD against 902 MAD in 2010 (-4.2%);
- Liabilities of 144 MAD against 134 MAD in 2010; an aggravation de 8%.

It is to be noted that SOREAD-2M Board of Directors decided to capitalize State advances formerly listed in the associates' current account. Besides, the State and the two companies are currently developing new programme contracts based on new specifications in order to strengthen coordination within the public pole, improve its governance and financial viability and enable it to implement such specifications requirements.

5.9.3. Fund allocation to promote the audiovisual landscape in 2013

Allocation to the Fund to promote the national audiovisual landscape is of 370 million MAD.

5.10. Independent audiovisual production in Morocco

Although the fund to support audiovisual works has been mentioned, it has not so far been created. The production sector has nevertheless developed during the past ten years.¹ In 2005, there were 57 independent production companies² and their number increased in the following years. In 2012, the Association of audiovisual companies (ASESA) estimates that there are 108 to 250 production companies in Morocco, including 20 to 30 which are well structured. According to the same source, these companies employ 50 to 60 people each, according to their activities, with an estimated total of 450 to 600 people (*extrapolated figures on the basis of producers' statements interviewed by ASESA*).³

5.10.1. The Association of audiovisual companies (ASESA) :

Constitution and Purpose

ASESA (Association of audiovisual companies) was created around the main production companies in Morocco. Its purpose:

- To gather film and audiovisual producers in a professional organization;
- To enhance the implementation of an audiovisual economy in Morocco;
- To raise institutional awareness to the need of creating a Fund to support audiovisual and film production;
- To promote the transmission of domestic audiovisual works.

In 2012, according to data collected from ASESA⁴, the private audiovisual production sector include between 108 and 250 companies including 20 à 30 which are well structured. ASESA divides them in two levels in terms of activity and type.

➤ *In terms of activity :*

- Mixed activity "film and TV audiovisual"
- Companies with TV dominance
- Mixed activity : "technical services /TV production"
- Mixed activity "technical services/ film production"

➤ *In terms of type :*

- Most companies are multi-type in TV activity. Some however, exclude fiction as too specific. Most companies are involved at the same time in :
 - TV production,
 - Advertising
 - Institutional films (transmitted or not on television)

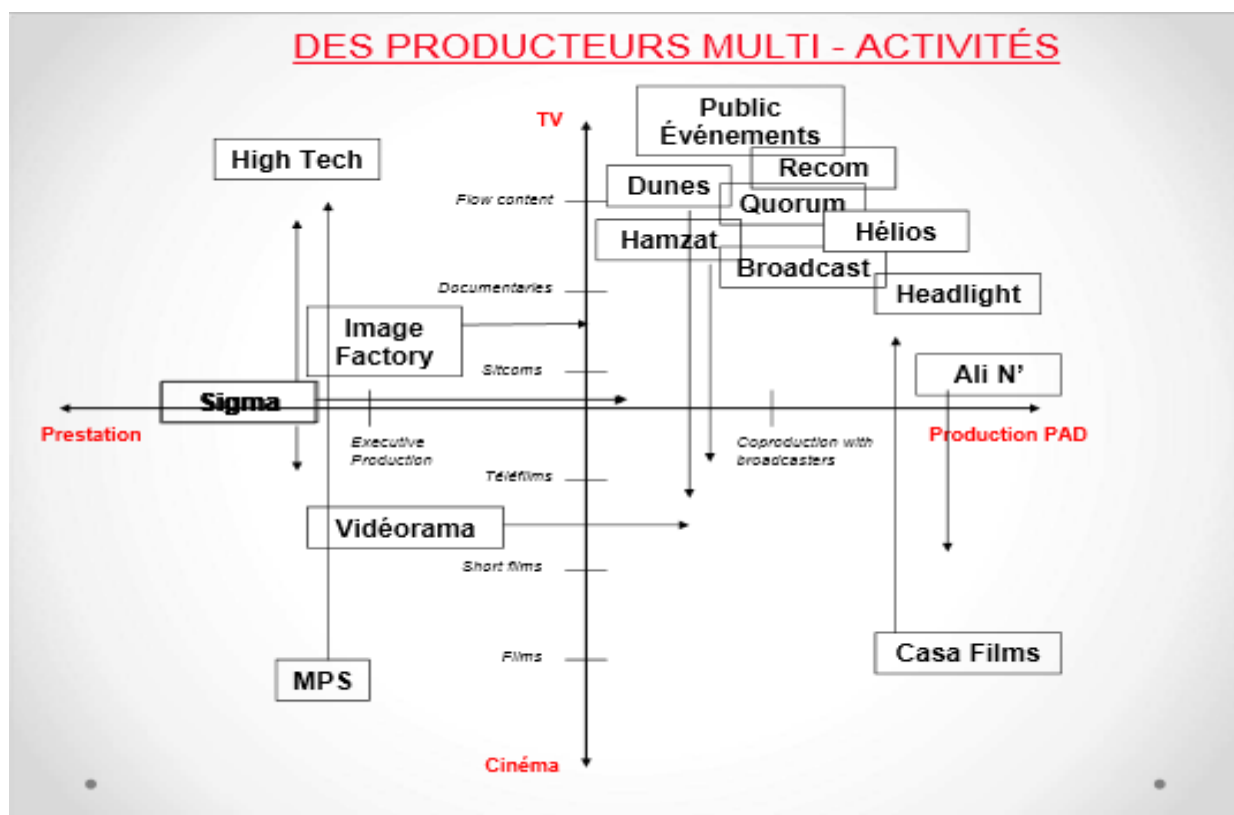
¹ « Le Maroc nouvel Eldorado de la production audiovisuelle ? », *Bladi.net*, 3 February 2007, <http://www.bladi.net/le-maroc-nouvel-eldorado-de-la-production-audiovisuelle.html>

² *Les conditions de développement de l'industrie audiovisuelle au Maroc*, ASESA, 2005, quoted in *Les industries créatives au Maroc*, UNESCO, 2009. <http://unesdoc.unesco.org/images/0021/002146/214643f.pdf>

³ Documents and data provided by the Association of audiovisual companies (ASESA) during our mission of data collection in Morocco (June 2012).

⁴ Documents and data provided by ASESA during our mission of data collection in Morocco (June 2012).

The following chart prepared by the producer Mostapha Mellouk provides additional understanding of the diversity of the activities of Moroccan producers.



Source : Mostapha Mellouk, « Pour une industrie audiovisuelle à la hauteur des aspirations des populations arabes » (Towards an audiovisual industry worthy of the ambitions of Arab populations), 1st Regional Conference of Euromed Audiovisual III Programme, Tunis, (14-15 November 2011), <http://www.euromedaudiovisuel.net/Files/2012/02/08/1328712553172.pdf>

According to the producer Mostapha Mellouk¹, Moroccan audiovisual production shows strength (interpersonal trust, slow implementation of contract relations) but it also suffers from weaknesses:

- Lack of clarity in procedures and criteria for decisions
- The needs of channels are badly identified and rarely stated in writing
- Master contracts are often inapplicable
- Absence of procedures in the execution: signature – production – payment

¹ M. MELLOUK, « Pour une industrie audiovisuelle à la hauteur des aspirations des populations arabes », Presentation at the Euromed Audiovisual Conference, 14-15 November 2011, <http://www.euromedaudiovisuel.net/Files/2012/02/08/1328712553172.pdf>

Company	Member
QUORUM	Saif MESTARI
RECOM	Farid BENYAKHLEF
SIGMA TECHNOLOGIE	Frank BEUGNIET Dino SEBTI
BROADCAST PRODUCTIONS	Abdellatif AFOUD
HEAD LIGHT PROD	Amina BENJELLOUN
HIGH TECH VISION	Hakim MASBAHI
M PROD	Aberrahim MAJD
HELIOS PRODUCTION	Karim ACHARKI
MEDIATION	Stéphane ANDRE
MPS	Sarim FASSI FIHRI
NINA PRODUCTION	Rajaâ CHRAIBI
PERFECT PRODUCTION	Rajaâ HASSANI
VIDEORAMA	Mly Ahmed BELGHITI
MEDIA & COMMUNICATION DEVELOPMENT	Mustapha MELLOUK
UNIVERS STUDIO	Ali CHATT
PUBLIC EVENT PROD	Othman BENABDELJELIL
ESPACE CINEMATOGRAPHIQUE CHAKIB FILM	Mustapha KHAYAT
IMAGE FACTORY	Mohamed RIZKI
STUDIO HM	Abdelmalik HOUNAIN

Turnovers

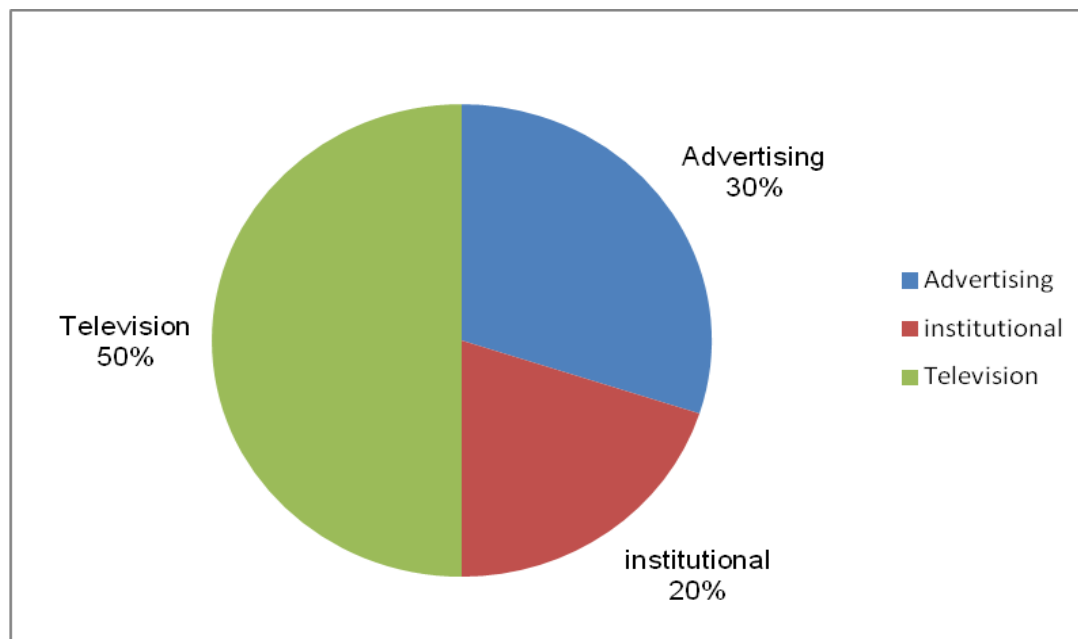
Turnovers range between 2 and 18 million MAD/company, for an estimated total of 100 to 200 million MAD/year (figures are extrapolated on the basis of statements by interviewed producers)¹.

The share of the turnover from television production varies according to the companies' activities:

- For mixed companies (cinema/TV): from 50 to 100% depending on the year
- For mixed companies (technical service/TV production): from 15 to 75% depending on the year.

According to ASES the breakdown of turnover in terms of type in audiovisual production activities may be summarized as follows:

¹ Ibid



Source : ASES 2012

The breakdown evolves over time: the oldest audiovisual production companies dedicate most of their activity to television production.

The following table prepared by ASESА reports the value chain of the audiovisual sector based on varied activity.

		In million MAD	
		Low	High
TV			
	RTM Budget	831	831
	<i>Including advertising</i>	110	110
	<i>Including State grant/budget</i>	721	721
	2M Budget	573	573
	<i>Including advertising</i>	440	440
	<i>Including State grant/budget</i>	133	133
Radio			
	Medi 1 advertising turnover	85	85
	Turnover other radios	15	15
	Radio advertisement design	8	8
Hardware			
	Sale of receiver equipment	630	630
Advertising			
	TV agencies turnover	91	114
	TV advertising board turnover	45	45
	Institutional AV Communication	18	18
Cinema			
	Film production support fund	30	30
	Paid ticket sales	97	97
	Music	p.m	p.m
Informal			
	Pay TV subscriptions	282	564
	CD/DVD sales and loans	282	564
International			
	Shooting and services external market	500	970
	International sale of productions	0	0

Source: ASESА document, June 2012

Audiovisual sector estimated between 3.4 and 4.5 billion MAD/year				
Distribution of created value	MMAD		en %	
Value created by domestic media activity	2,423	2,446	69%	54%
Value created in the informal market	564	1,128	16%	25%
Value created on the international market	500	970	14%	21%
Total value created	3,487	4,544	100%	100%

Source : ASESА, June 2012

5.10.2. The Association of audiovisual designers and professionals (ACPAV)

It was established in November 2011 as part of the energy pervading the audiovisual sector in Morocco. The Association of audiovisual designers and professionals has set to itself many goals in order to provide the adequate environment to any designer, artist or technical expert in the field. It has multiple goals and produces valuable studies on the problems which professional and designers face in their professional practice¹.

It has multiple ambitions within the scope of the changes facing the industry, with the advent of the new specifications whose application is its primary concern. The association aims at discussing and upgrading its various provisions.

In addition to discussing and upgrading various aspects, ACPAV aims at creating synergy among the various audiovisual competencies, ensuring compliance with the industry's code of conduct, and seeking to improve product quality. Not only do the ideas and projects of ACPAV support professionals and designers, but they also contribute to the country's development in social, economic, cultural, sports and artistic terms².

With the support of the Moroccan Association of viewer rights and the Union of audiovisual production companies, on 26th December 2006, ACPAV published a statement on the crisis of the sector and the difficulties experienced by the men and women working in it³.

Abdelmalik Hounain, president of ACPAV declared: *"In the statement, we pointed at all the authorities in charge of managing the sector. We are asking them to play their role effectively in order to put an end to the state of clinical death which characterizes the sector by implementing all the legal provisions likely to improve quality, to enforce the principles of transparency, equality, opportunity, cultural plurality, creative freedom and linguistic and cultural openness"*⁴.

5.10.3 Project of a portal dedicated to submitting production projects⁵

In his statement on Tuesday, Mustapha Khalfi, Minister of Communication and Government spokesperson, considered that the creation of a portal dedicated to submitting production projects is a first step to anchor governance in the public pole.

The Minister, who was replying orally to a question on governance in public broadcasting media at the House of Councilors, stated that the project was effectively under way as the portal is to be launched and the conditions of the calls for applications are to be clearly defined with principles of transparency and equality of chances.

¹ Ouafaâ Bennani, « Rencontre du bureau de l'Association des créateurs et des professionnels de l'audiovisuel au Maroc : Communiquer avec les médias pour mieux se faire connaître », LE MATIN, 26 September 2012, <http://www.lematin.ma/journal/Rencontre-du-bureau-de-l-Association-des-createurs-et-des-professionnels--de-l-audiovisuel-au-Maroc-Communiquer-avec-les-medias--pour-mieux-se-faire-connaître-/171986.html>

² Ibid.

³ Ouafaâ Bennani, « Association des créateurs et des professionnels de l'audiovisuel au Maroc : Les professionnels de l'audiovisuel se mobilisent pour améliorer leur situation », LE MATIN, 26 December 2012, <http://www.lematin.ma/journal/Association-des-createurs-et-des-professionnels-de-l-audiovisuel-au-Maroc-Les-professionnels-de-l-audiovisuel-se-mobilisent-pour-améliorer-leur-situation-/175894.html>

⁴ Ibid.

⁵ Project of a portal dedicated to submitting production projects, 05 February 2013, <http://www.mincom.gov.ma/fr/actualites/item/849-projet-de-portail-d%C3%A9di%C3%A9-au-d%C3%A9p%C3%B4t-des-projets-des-soci%C3%A9t%C3%A9s-de-production.html>

These measures also include activating the structures of governance (monitoring committees of programme contracts, system of benefits and investments) and working for the implementation of 15 recommendations of the General Inspection of Finances on, among other things, procurement, structuring and relationships with production companies.

As to external production (series and documentaries...), which has a budget reaching 500 million Dirhams, the Minister stated that it is to be now subject to the procedure of calls for applications and free competition in the context of implementing the principle of governance¹.

¹ Ibid.



6. MEASURING TELEVISION AUDIENCE: MAROCMÉTRIE¹

With the tool for measuring media audiences, Morocco is a pioneer in Africa and the Arab world. In 2011, Marocmétrique achieved a turnover of 25.4 million MAD (2.3 million EUR).

6.1. Features of Marocmétrique

Since 28th March 2008, Marocmétrique provides the reference measure of television audience in Morocco. To this end, it uses a panel of households. The Marocmétrique panel is representative of Moroccan rural and urban population with a television set. To 1st January 2012, Marocmétrique panel consisted of 3,784 people of the age of 5 and older living in 769 households. In each household of the panel Marocmétrique installs one or more people metres with remote controls which have individual keys. These allow to determining automatically whether television is ON/OFF and which channel is viewed.

6.2. Capital Structure

Marocmétrique capital is shared among share holders according to the following distribution:

- Médiamétrie (62%)²
- CSA France (3%)
- LMS-CSA (15%)
- Individuals (20%)

6.3. Mission of Marocmétrique

Marocmétrique's mission consists in measuring TV audience round the clock and seven days a week for the channels which are object of the contract with CIAUMED³, in charge of monitoring and controlling audiovisual media measurement.

Marocmétrique is based on the expertise of over 25 years of Médiamétrie - the reference in France in measuring TV, Radio and Internet audience - on Watermarking⁴ technology and on the field work skill of the Moroccan Polling Institute LMS-CSA.

¹ <http://www.marocmetrie.ma/>

² In June 2012, Médiamétrie former share holder of Marocmétrique owning 34%, goes up in the capital of Marocmétrique to 62% through purchasing part of the capital (28%) owned by CSA, multi-specialist research institute, subsidiary of Bolloré Group since 2006. CSA and LMS-CSA (a leading market research company in Morocco) remain in the capital of Marocmétrique alongside Médiamétrie. See : *Médiamétrie devient actionnaire majoritaire de Marocmétrique*, 26 June 2012, [http:// www.boursier.com](http://www.boursier.com)

³ Bringing together the entire profession, CIAUMED owns the results of Marocmétrique. CIAUMED is an economic interest grouping which gathers: television channels and their agencies, GAM (Association of Moroccan advertisers) and UACC (Union of Communication agencies).

⁴ "Audio Watermarking" consists in concealing a sign in an audio content which can later be found at reception whatever the means of transmission - terrestrial, satellite, cable, ADSL, analogue, digital- and the reception

Marocm  trie also performs three times a year a questionnaire-based audience measurement “Interm  trie” using 3333 people, representative of the whole Moroccan population.

6.4. Audience indicators

- Viewing time per person: average time spent watching television (whatever channel) by all the people of the studied population.
- Viewing time per viewer: average time spent watching television (whatever channel) by all the viewers (people watching television).

6.5. Rules of dissemination

Any dissemination of results provided must comply with the following rules whatever the dissemination mode (verbal included):

- Any reference to results must include :
The mention “Marocm  trie audience results; all rights reserved by CIAUMED, replication and transmission prohibited unless authorized”, as well as other necessary details for a good reading of the results: collection or survey period, precise nature of indicator(s), criteria, time slots, population, etc.
- The result should not be likely to mislead the person(s) to whom they are issued. Results may only be replicated in the conditions allowing the reader, or the attentive listener with an average level of education, to understand the meaning and scope of such results. These results may be compared only to comparable results from the same source (same indicators, same period or prior comparable period, same population/ target...)¹.

6.6. Special programme of Wednesday 6th June 2012

The implementation of the audience measuring device Marocm  trie is regarded as a major achievement in the process of restructuring the television market in Morocco. In consequence, it has become possible to obtain accurate data on viewership of Moroccan channels and/or talk shows and broadcast events.

As an example, audience results issued by Marocm  trie on the special programme where the Head of Government was invited to discuss the late price increase of fuel on Wednesday 6th June 2012, made the headlines of Moroccan press. As underlined in the press release of Marocm  trie, the special programme broadcast live with the Head of Government on both channels Al Aoula and 2M gathered 6,991,000 viewers of 5 years of viewing both channels together.

Date	Measured channels	Number of cumulative viewers
Wednesday 6th June 2012	Al Aoula	3, 307,000
	2M	5, 339,000
	Al Aoula + 2M	6, 991,000

equipment. For audience rating, the mark contains the identifier of the channel. Source : Documents provided by Marocm  trie during our data collection mission in Morocco (24-29 June 2012).

¹Marocm  trie Interprofessionnal centre of Audim  trie CIAUMED, daily press release, key figures of TV audience of 20th to 26th June 2012.

In average per second, a total of 3,518,000 people of the age of 5 and older, on both channels Al Oula and 2 M, were watching the programme, with an audience share of 40%.

Date	Measured channels	Number of viewers	PDA %
Wednesday 6th June 2012	Al Aoula + 2M	3, 518,000	40%

Audience is similar across targets with a slightly higher audience in rural area and among males.

Date	Measured channels	Target	PDA %
Wednesday 6th June 2012	Al Aoula + 2M	Urban area	39.9%
		Rural area	40.3%
		Males	42.1%
		Females	38.5%

NB: total of both channels, time slot 21:45:50 – 22:42:24

6.7. Annual/monthly panels for audience measurement

As it is the case in most Western countries and some Arab countries (notably Jordan and Lebanon), the Moroccan system of modern audience measuring based on audience rating, allows us to establish an overview of statistical data on television reception in the Kingdom.

Based on: Total individuals 5+	Period: Jan 3rd, 2011 - Jan 1st, 2012 Mo-Su / 03:00-27:00	TV distribution (% of TV households): Satellite + IPTV: 75% <small>Source: Establishment Survey 2009. Based on 4,248,975 TV households.</small>	Analogue terrestrial switch off: ▶ To be completed by June 2015 for the UHF June 2020 for the VHF
Size of the universe: 26,263,000 (5,665,300 TV households)	Area: National (urban and rural areas)		Time shifted viewing measurement: No
Size of the panel: 3,750 (758 TV households) <small>as per September 1st, 2011</small>	Instrument used: People Meter (since 2008)		Guest viewing measurement: Yes (since March 2008)
			Digital Terrestrial TV (DTT) measurement: Yes (since March 2008)

Source: Eurodata TV Worldwide – One Television Year in the World 2012 issue. Marocmétrie - CIAUMED

- Best performing channels for 2011 (based on Total Day)

Pursuant to the agreements with Médiamétrie / Eurodata TV Worldwide we are not entitled to provide the data in their online electronic version. This data is available in print, and may be provided on request.

- Average daily viewing time (per individual - in H : MIN)

Pursuant to the agreements with Médiamétrie / Eurodata TV Worldwide we are not entitled to provide the data in their online electronic version. This data is available in print, and may be provided on request.

Year 2011- From 3rd January 2011 to 1st January 2012
Television viewing time

Viewing time per individual *

Daily viewing time of television per person in hours and minutes

Mean day Monday / Sunday - from 3H to 27H

	Viewing time (in H MIN) Comparison 2011 / 2010		Viewing time (in H:MIN) Detail per period of the year 2011				
	Year 2011 *	Year 2010 *	Jan.-Feb. 2011*	March-April-May 2011 *	June-July- 2011 *	Ramadan 2011 *	Sept-Oct.-Nov.-Dec. 2011 *
Per household	7H 53MIN	7H 45MIN	8H 10MIN	8H 12MIN	7H 10MIN	8H 41MIN	7H 42MIN
People 5 and older	3H 19MIN	3H 16MIN	3H 27MIN	3H 27MIN	2H 46MIN	3H 50MIN	3H 20MIN
Children 5 - 14	3H 19MIN	3H 16MIN	3H 26MIN	3H 26MIN	2H 51MIN	4H 00MIN	3H 16MIN
Young people 15-24	3H 04MIN	3H 04MIN	3H 13MIN	3H 07MIN	2H 34MIN	3H 48MIN	3H 03MIN
Women 15 and older	3H 38MIN	3H 32MIN	3H 43MIN	3H 45MIN	2H 59MIN	4H 06MIN	3H 45MIN
Men 15 and older	3H 00MIN	3H 00MIN	3H 12MIN	3H 08MIN	2H 29MIN	3H 30MIN	2H 57MIN
Active 5 and older	2H 43MIN	2H 46MIN	2H 50MIN	2H 48MIN	2H 11MIN	3H 15MIN	2H 45MIN
Urban 5 and older	3H 52MIN	3H 47MIN	4H 01MIN	3H 56MIN	3H 15MIN	4H 21MIN	3H 55MIN
Rural 5 and older	2H 39MIN	2H 33MIN	2H 46MIN	2H 49MIN	2H 09MIN	3H 13MIN	2H 37MIN

Example of interpretation: During 2011, one person of the age of 5 or older watches TV during a daily average of 3 hours and 19 minutes. Besides, the daily viewing time per household is an average of 7 hours and 53 minutes, i.e. there is, on average, per day and per household, at least one TV set switched on during 7 hours and 53 minutes.

Viewing time per individual

Daily viewing time of television per person in hours and minutes

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People of 5 and older	Comparison 2011 / 2010	
	Year 2011 *	Year 2010 *
	4H 36MIN	4h 25MIN

Example of interpretation: During 2011, one viewer of 5 or older watches TV during a daily average of 4 hours and 36 minutes versus 4 hours and 25 minutes in 2010.

Overall list for 2011

The comments below are valid for all the lists. The national channels that were studied are Al Aoula and 2M.

The classification of programmes is done on the basis of their number of viewers.

IMPORTANT: In the case of recurrent programme or repeated broadcasting, only the time when audience was the highest is included in the list.

For example, in the case of a series broadcast everyday only the episode that had the best audience is kept.

Top 20 of Al Aoula

Programme	Additional label / Type	Number of viewers	Audience share (%)	Release date	Start time
1 LALLA LAAROSSA	MUSIC ENTERTAINMENT	5 146 000	50.4	Fri 20 May 2011	21 h 52 min 34 s
2 COMEDIA 4	COMPETITION YOUNG ACTORS	5 000 000	49.4	Fri 6 May 2011	22 h 6 min 43 s
3 METEO	PRESENTER : LOUBNA BEN ERRAMI	4 652 000	40.9	Fri 11 March 2011	21 h 14 min 22 s
4 MOUDAWALA	MAGAZINE OF SOCIAL EVENTS (SUBJET : QADAYA AL JONH)	4 216 000	42.2	Sun 1 May 2011	21 h 59 min 0 s
5 AICHA	MOROCCAN TV FICTION	4 180 000	40.2	Wed 23 March 2011	21 h 33 min 55 s
6 SALEM WA SOULEM	MOROCCAN TV FICTION	3 975 000	38.8	Wed 16 March 2011	21 h 41 min 47 s
7 JOURNAL TELEWISE EN ARABE	PRESENTER : MOHAMMED RADI ELLAYLI	3 930 000	36.5	Fri 11 March 2011	20 h 30 min 15 s
8 45 DAKIKA	MAGAZINE OF SOCIAL EVENTS (SUBJECT : MARRAKECH AL HAMRAE AL KHAMI	3 834 000	44.6	Sun 15 May 2011	22 h 0 min 8 s
9 SADA AL JABAL	MOROCCAN TV FICTION	3 806 000	39.6	Wed 30 March 2011	21 h 48 min 59 s
10 SOIREE AL OULA	MUSIC ENTERTAINMENT (BEST OF)	3 804 000	46.0	Fri 9 December 2011	21 h 47 min 21 s
11 M ME TAJA	MOROCCAN SERIES	3 782 000	38.5	Thur 10 March 2011	21 h 56 min 48 s
12 MEN DAR LDAR	MOROCCAN SERIES	3 525 000	32.4	Thur 3 February 2011	21 h 13 min 11 s
13 TIFL AL QOMAMA	MOROCCAN SHORT FILM	3 418 000	33.9	Wed 2 February 2011	21 h 28 min 0 s
14 AWLAD CHAMSS	MOROCCAN SHORT FILM	3 396 000	33.6	Wed 2 February 2012	21 h 46 min 38 s
15 AGHANI MIN SAHARAT LALLA LAAROSSA	MUSIC ENTERTAINMENT	3 324 000	35.3	Fri 30 December 2011	21 h 28 min 15 s
16 COMEDIA SHOW	MUSIC ENTERTAINMENT	3 208 000	32.5	Fri 21 January 2011	21 h 28 min 59 s
17 RIAD ALMAATI	MOROCCAN TV FICTION	3 183 000	39.2	Wed 1 June 2011	21 h 53 min 0 s
18 SAAA FI AL JAHIM	MOROCCAN SERIES	3 144 000	39.8	Sun 15 May 2011	23 h 2 min 54 s
19 DARBAT MIQASS	MOROCCAN SHORT FILM	3 143 000	32.6	Wed 2 February 2011	22 h 3 min 17 s
20 NAGHMAWATAY	EVENING ENTERTAINMENT (GUEST : NAJAT AATABOU)	3 096 000	32.7	Fri 4 February 2011	21 h 26 min 50 s

Overall list for 2011

Top 20 of 2M

Programme	Additional label / Type	Number of viewers	Audience share (%)	Release date	Start time
1 TAKBAR OU TANSA	MUSIC HUMOUR	7 101 000	67.7	Thur 25 August 2011	19 h 26 min 40 s
2 DIMA JIRANE	MOROCCAN SERIES	6 345 000	59.2	Tues 23 August 2011	19 h 54 min 52 s
3 MA TANSANICH	TURKISH SERIES	5 796 000	56.2	Thur 29 December 2011	19 h 24 min 56 s
4 JAR WA MAJROUR 2011	MUSIC HUMOUR	5 706 000	58.6	Tues 23 August 2011	20 h 31 min 9 s
5 ESTRELLA	MEXICAN SERIES	5 688 000	55.5	Mon 14 November 2011	19 h 26 min 1 s
6 HDIDANE	MOROCCAN SERIES	5 539 000	52.9	Thur 26 May 2011	21 h 47 min 39 s
7 AKHTAR AL MOUJIRIMINE	MAGAZINE (SAFFAH TAROUDANT)	5 508 000	46.0	Tues 29 March 2011	21 h 32 min 58 s
8 MADAME MSSAFRA	REALITY SHOW	5 214 000	48.4	Tues 11 October 2011	21 h 20 min 47 s
9 AL WAJH AL AKHAR	MAGAZINE (MOUHAFED ASSIHA)	5 046 000	60.2	Thur 10 November 2011	22 h 27 min 53 s
10 HOSSEIN WA SAFIA	MOROCCAN SERIES	4 863 000	47.9	Thur 31 March 2011	21 h 39 min 48 s
11 SALON SHEHRAZADE	MOROCCAN SERIES	4 735 000	52.8	Wed 17 August 2011	20 h 50 min 21 s
12 STUDIO 2M	COMPETITION YOUNG ARTISTS	4 700 000	45.5	Sat 23 April 2011	21 h 36 min 23 s
13 AL KHAYT AL ABYAD	MAGAZINE OF SOCIAL EVENTS	4 645 000	41.2	Mon 31 January 2011	21 h 19 min 22 s
14 EZEL	TURKISH SERIES	4 579 000	54.3	Mon 24 October 2011	18 h 34 min 8 s
15 RAMAD AL HOUB	TURKISH SERIES	4 497 000	43.7	Mon 31 January 2011	19 h 35 min 59 s
16 AL KHATTAF	MOROCCAN FILM	4 461 000	60.4	Tues 2 August 2011	22 h 31 min 10 s
17 PAPI RICKY	MEXICAN SERIES	4 404 000	48.3	Mon 31 January 2011	18 h 51 min 8 s
18 SAHRAN MAAK ALLAYLA	MUSIC ENTERTAINMENT (BEST OF)	4 395 000	45.3	Sat 5 November 2011	21 h 16 min 7 s
19 AL WAAD	TURKISH SERIES	4 180 000	44.7	Wed 9 March 2011	19 h 35 min 23 s
20 MASSAR	MUSIC ENTERTAINMENT (GUEST: ABDELQADER MOUTAE)	4 142 000	47.7	Sat 29 October 2011	21 h 16 min 34 s

Are included in this list programmes which are 5 minutes long or longer

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Key figures of TV audience
From 20th to 26th June 2012

Television audience

Daily television viewing per person in hours and minutes

Mean day Monday / Sunday - between 3H and 27H – People of 5 years of age and older

	Viewing time per individual (in min)	Examples of interpretation :
From 20th to 26th June 2012	3H 24MIN	From 20th to 26th June 2012, a person 5 years of age or older watches television during a daily average of 3 hours and 24 minutes.

Audience of the 7 national channels

Mean day/Sunday – People 5 years of age or older

The national channels studied are Al Oula, 2M, Al Maghribiya, Al Oula International, 2M Monde, Arryadia, Tamazight.

Total of other Moroccan channels: 2M Monde, Al Oula International, Arryadia, Tamazight

N.B: Al Oula International and 2M Monde are included in Other Moroccan channels when programme broadcast on satellite is different from programme in terrestrial (satellite break).

	Audience share - From 20th to 26th June 2012			
	Al Oula	2M	Al Maghribia	Other Moroccan channels
Total Day (3h00- 27h00)	9.4%	27.0%	2.7%	2.0%
Prime time (20h50-22h30)	18.6%	17.9%	3.3%	3.0%

Key figures of TV audience From 20th to 26th June 2012

List of programmes of national channels :

The only programmes included in this list are those of 5 mins or longer.

The classification of programmes is done on the basis of their number of viewers.

IMPORTANT: in the case of a series broadcast everyday only the broadcasting that had the best audience is kept.

Top 5 of Al Oula	Programme	Number of viewers	Audience share (%)	Release date	Start time
	1 LALLA LAAROSSA	4 587 000	46.4	Fri 22 June 2012	21 h 57 min 15 s
	2 MEN DAR LDAR	2 264 000	27.8	Sun 24 June 2012	22 h 52 min 34 s
	3 METEO	2 251 000	28.1	Fri 22 June 2012	21 h 42 min 33 s
	4 MOUDAWALA	2 045 000	28.0	Sun 24 June 2012	21 h 49 min 47 s
	5 LKHOUATATE	1 571 000	19.5	Mon 25 June 2012	22 h 12 min 6 s
Top 5 of 2M	Programme	Number of viewers	Audience share (%)	Release date	Start time
	1 MA TANSANICH	5 331 000	65.2	Thur 21 June 2012	19 h 19 min 5 s
	2 DIABLO	3 530 000	49.1	Tues 26 June 2012	14 h 15 min 41 s
	3 MASSAR	2 948 000	35.0	Sat 23 June 2012	21 h 59 min 37 s
	4 MAWIID ZAFAT	2 784 000	47.4	Tues 26 June 2012	16 h 4 min 41 s
	5 DIL AL JARIMA	2 713 000	31.6	Wed 20 June 2012	22 h 9 min 27 s

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7. INTERNET TV AND AUDIOVISUAL SERVICES ON DEMAND

7.1. Channels broadcast via Internet

With the arrival of high speed broadband, streaming on internet has become easier and web TVs have emerged. Currently, Moroccan television channels broadcast live on Internet.

- SNRT online

On Monday 14th December 2009, SNRT Group launched its new web portal. Each of the six television channels and four radio stations of the group now has its own website to which a website introducing **snrt.ma** as an institution is added, as well as a website for the advertising board for the group.

Indeed, in addition to being SNRT institutional showcase, the portal is primarily a new medium for the television and radio channels of the group. The portal provides also detailed access to TV programmes.

Concerning user access to programmes, a 512 kbps connection is required for viewing video content and a simple 128 kbps is sufficient to listen to online radio¹.

- 2M online

With the 2010 launch of www.2M.ma all programmes produced by 2M or in rights (films, series, sitcoms, magazines, entertainment, news, capsules...) are now online.

The objective of 2M.ma portal was to reach 3 million viewers per month and 50% active internet users. The deployment of 2M services online in fact led to exceeding those set figures. (See 6.2)

From that same date, 2M Interactive launches advertising clips on interactive TV services (Catchup and Replay); a first in Morocco. It enables internet viewers to watch or repeat for free and in full, 2M programmes on the website 2M.ma².

¹ http://www.emarrakech.info/Le-nouveau-portail-web-de-la-SNRT-est-en-ligne_a30025.html

² http://www.2m.ma/var/images/pub/publicite/CGV_SOREAD_2M_2012.pdf

7.2. Video sharing websites

The development of broadband networks is also an opportunity for video sharing platforms, financed by advertising.

In 2010, the French video sharing platform owned by France-Telecom, Dailymotion, launched a Moroccan version in association with Adwebmaroc.¹

In March 2011, Google Arabia² announced the launch of geo-positioned systems in 8 Arab countries: Algeria, Egypt; Jordan; Morocco; Saudi Arabia; Tunisia and Yemen³. On 30th April 2012 Google and YouTube in the Middle East announced the arrival of “Home Page ad” on YouTube. As the largest entertainment world platform in the MENA region, YouTube offers an *ad space* on the homepage. With over 6.2 million daily visits from Saudi Arabia, United Arab Emirates, Egypt and Morocco and around 5.2 million daily visits on mobile, this would have a huge impact on media planning. In October 2012, Google Arabia announced a programme on its blog promoting “Internet in Arabic” in collaboration with academia. In order to make up for the dominance of English on Internet and the tendency for Arab internet users to write in English, Google created a tool to write Arabazi (Arabic written in Roman Characters) in traditional Arabic characters.⁴

7.3. Moroccan broadcasters’ branded channels on video-sharing channels

In addition to their own website, some Moroccan channels (like many European channels) use the opportunities offered by “branded channels” on video sharing platforms like Youtube and Dailymotion.

2M uses them to offer some of its programmes. By 31st October 2012, around 8.7 million viewings were made⁵. In 2012, 2M reinforced its presence by also creating a branded channel on Youtube⁶. The online content of the public channel already offers in normal time a “replay” option for 2M lead programmes⁷. By 31st October 2012, over 4.1 million videos had been viewed and the number of subscribers reached 6,268.

Medi1 TV also created its branded channel on YouTube⁸, offering a whole playlist to its subscribers during Ramadan of 2012. Series and documentaries were offered at the first online attempt by the Tangiers channel during the holy month – with over 3 million viewings on

¹ <http://www.dailymotion.com/ma> Dailymotion press release, 4th October 2010.

<http://press.dailymotion.com/fr/index.php/2010/10/04/dailymotion-lance-son-site-marocain-en-partenariat-avec-adwebmaroc/>

² <http://google-arabia.blogspot.fr/>

³ <http://thenextweb.com/me/2011/03/10/youtube-launches-localized-versions-for-mena/>

⁴ Google Arabia blog, 25th October 2012) <http://google-arabia.blogspot.fr/>

⁵ <http://www.dailymotion.com/2mtv#video=xsrq5o>

⁶ http://www.lesechos.ma/index.php?option=com_content&view=article&id=24984%3Ail-y-a-de-laudience-en-ligne&catid=13%3Amedias&Itemid=19

⁷ <http://www.youtube.com/user/2MTvChannel>

⁸ <http://www.youtube.com/user/canalmedi1sat>

YouTube. The channel offered a whole range of online Ramadan programmes¹. By 31st October 2012, it had 407 subscribers.

7.4. Audience of online video sites in Morocco

In its report "ICT adoption and prospects in the Arab region 2012",² ITU proposes a table with the 20 most visited websites in Morocco in December 2011, developed by Alexa³.

Ranking of most visited websites in Morocco, December 2011

Rank	Website	Target users	Default language*	Description
1	Facebook.com	Global	English	Online social networking
2	youtube.com	Global	English	Video sharing and broadcasting portal
3	google.co.ma	Global	English	Web search portal
4	google.com	Global	English	Global web search portal
5	live.com	Global	English	E-mail portal
6	hespress.com	Local	Arabic	Newspaper
7	google.fr	Global	French	Web search portal
8	Kooora.com	Regional	Arabic	Sports
9	blogspot.com	Global	English	Online blogging service
10	yahoo.com	Global	English	Miscellaneous online services
11	wikipedia.org	Global	English	Encyclopedia
12	xnxx.com	Global	English	Adult content
13	msn.com	Global	English	Miscellaneous online services
14	startimes.com	Local	Arabic	Online forums
15	babylon	Global	English	Translation software
16	hibapress.com	Local	Arabic	Newspaper
17	inwi.ma	Local	French	Telecom operator portal
18	iam.ma	Local	French	Telecom operator portal
19	alwadifa-maroc.com	Local	Arabic	Online forum
20	Maktoob.com	Regional	Arabic	Miscellaneous online services

Note: *The default language is the language that appears when first visiting the website

Source : Alexa.

¹ *Les Echos*, Ibid.

² <http://www.itu.int/pub/D-IND-AR-2012>, p.105

³ Alexa is a subsidiary of Amazon inc. which makes international and country rankings of website visits. The reliability of these measures is subject to contestation by specialists of internet audience measuring, because it rests on a less advanced method than in paying audience measuring services (like those offered by Comscore, Nielsen, Médiamétrie). When sophisticated measures are not available, Alexa is recognized as a useful indicator. For a more exhaustive and updated ranking, see <http://www.alexa.com/topsites/countries/MA>

As shown in the table, the adoption rate of online content in Arabic is still behind, compared to that of contents offered by world portals like Google, Facebook and YouTube. The innovating local portal is a daily news website, hespress.com, which ranks sixth most visited website by Moroccans¹.

Out of its twenty websites, many contain a large amount of video:

- Social networks and video sharing websites: Facebook.com (US), Youtube.com (US), google.co.ma, (MA)
- News websites hespress.com (MA, without mention of owner but associates such as the channels Al Ann, Al Muhajir, Youniwemi, AMP Press, and RNW Radio Netherlands Worldwide). This website is regarded as a core source of information on Morocco.
- Websites advertising jobs, recruitments, job competitions and entrance examinations to the prestigious schools (alwadifa-maroc, MA)
- Biligual community website (Arabic and English) with various online services (maktoob.com, MA)
- Websites with adult content (xnxx.com, US) with pornographic videos, some of which seeming more like child pornography.

¹ <http://www.itu.int/pub/D-IND-AR-2012>, op.cit.

8. THE FILM MARKET

8.1. Historical overview

The history of Moroccan cinema may be said to have started between 1897 and the First World War. The first shooting in 1897, of *Le Chevrier marocain* (*The Moroccan goatherd*) by Louis Lumière, inaugurated a tradition of foreign filming in Morocco. The operators of Lumière brothers landed with their equipment to carry out some experiment, filming Moroccan daily life and shooting documentaries.

Then it was the second stage, commonly known as the period of colonial cinema. It was an entertainment cinema, based on escape and exoticism and addressed to mainland audiences. Its first success was with *L'Atlantide*. Its success attracted filmmakers, technical engineers, capital and business companies to create militarist films to flatter French identity.

In these films, designed to give higher value to the Occupier, Maghrebians experienced history rather than made it. In a certain way, "the history of colonial cinema is the history of this negation"¹. Nevertheless, the Protectorate was the time when Moroccan cinema developed. Studios moved to Casablanca in 1939 and to Rabat in 1944. All towns had their well organized movie theaters.

In 1952, Orson Welles presented his *Othello* under Morocco at the Cannes Film Festival and won the *Palme d'or*. However, Moroccan film production of that period was strongly influenced by readapting Egyptian productions. *Le fils maudit* by Mohamed Ousfour in 1958, a true art film, is one the few quality productions of the period.

The third stage which started in 1968 with *Vaincre pour vivre* is the founding period of a true, independent, Moroccan cinema. The event was a significant sign: Moroccan cinema was emerging. This first feature film by Mohammed B.A Tazi opened the way for new filmmakers and directors to found the classical era of Moroccan cinema². These film directors will raise Moroccan cinema to a higher level and restore its former glory.

Most scholars and film critics agree that the real history of Moroccan cinema started with the production of *Wechma* by Hamid Bennani in 1970. *Wechma* (or *Traces*) regarded as the pearl of Moroccan cinema started a new wave known as "film modernity". The end of the 1970's was a transition period with the emergence of a commercial cinema which hailed the fourth stage of Moroccan cinema, or the contemporary period.

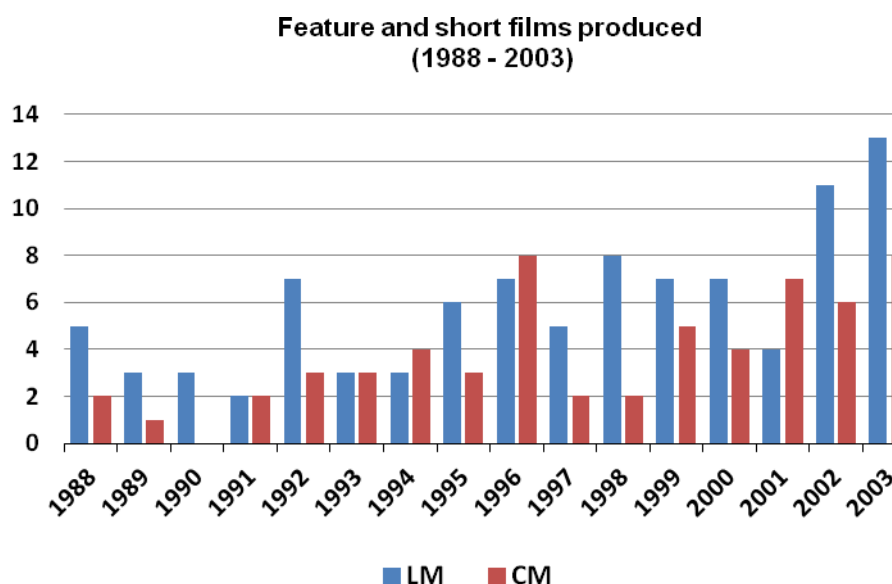
The history of Moroccan cinema is marked by the development, since 1992 of Amazigh film which is highly present on the Moroccan audiovisual and film scene and which plays a significant role in preserving Amazigh identity and culture in the national environment.

¹ Moulay Driss Jaïdi, *Histoire du cinéma au Maroc : le cinéma colonial*, Almajal, Rabat, 2001. On the history of Moroccan cinema, see also: P. AKALAY, *Au service du cinéma marocain*, Al Asas, Rabat, s.d. (ca 2003) ; A. RAIB, *Il était une fois le cinéma au Maroc*, EDH, 1999 ; S. GAYLE CARTER, *What Moroccan Cinema? : A Historical and Critical Study, 1956-2006*, Lexington Books, 2009; B. RACHID, *La notion de cinéma marocain en question*, Doctora dissertation: Communication, Arts, Spectacles : Bordeaux 3 ,1994 ; V.K. ORLANDO, *Screening Morocco: Contemporary Film of a Changing Society*, Ohio University Centre for International Studies, 2011

² New films emerge with this vocation. We can mention for example: Moumen Smihi (*Traces* - 1970), Habib Bennani (*Wechma*- 1970) Souheil Benbarka (*Mille et une mains* - 1972), Jilali Fehrati (*Poupées de roseau*-1981), Mohammed Reggab (*Le coiffeur du quartier des pauvres*-1982).

From 1992 to 2008, 28 audiovisual and film production companies produced 158 films, not counting the 7 Amazigh films produced by the first national channel¹.

The symbolic value of Amazigh cinema, generally drawing on local experience, is inseparable from Moroccan film production as a whole. Between 1988 and 2003 it accounted for 154 films (94 feature films and 60 short films). Between 2004 and 2012, 118 feature films and 58 short films were produced, enriching the Moroccan film industry with a total of 176 films.



Source: CCM, Production Division, Support Fund Department.

The contemporary period in the history of Moroccan cinema is essentially marked by the recovery by public authorities of their role in organizing the field and controlling the assistance Fund. The period also reflects a dynamic industry earning for Morocco an important status on the Mediterranean, regional and international scene.

Thanks to State support, film production in Morocco went from 1 to 2 films per year in the 1960's and 70's to an annual average of 15 feature films and around 40 short films in the present². The historical leap of the sector is due to the strategy developed and implemented by a public stakeholder: The Moroccan Cinematographic Center CCM (le Centre Cinématographique Marocain).

8.2. The Moroccan Cinematographic Center (CCM)³

CCM was established by a dahir in 1944¹. It is the main public body in the film industry. It was reorganized in 1977², and is now a public institution with a legal personality and financial independence, working under the Ministry of Communication.

¹ Omar Idtnaine, *Le cinéma amazigh au Maroc : Éléments d'une naissance artistique*, in *Africultures*, 20/10/2008, <http://www.africultures.com/php/index.php?nav=article&no=8117>

² <http://www.mincom.gov.ma>

³ <http://www.ccm.ma/>

8.2.1. CCM Mission

CCM main role consists in organizing and promoting film industry in Morocco. Its purpose is primarily to organize and promote film industry in Morocco. Its object is production, digital and argentic post-production, the preservation and restoration of archive films, the distribution and screening of films. The institution enforces the laws and regulations concerning all areas of the industry³.

- CCM delivers :

- Film shooting permits
- Professional identity cards
- Film exploiting certificate
- Practice permits, for the benefit of film producers and distributors (cinema and video), as well as for the benefit of film exhibitors and owners of video clubs,

It should be noted that Morocco supports the production of feature and short films via an assistance Fund to national film production. CCM runs the control and administration of the Fund.

CCM made tremendous achievements to improve the transparency of the sector and its activities. It annually publishes an Assessment of the sector (*Bilan Cinématographique/Film industry Assessment*), which serves as the main source of information on the industry.

The objectives and actions of CCM are defined in a Book of Specifications established by the Ministry of Communication.⁴ The latest Specifications to date were approved on Monday 15th October 2012 during the extraordinary session of CCM Executive Board. According to the Ministry of Communication, this meeting was marked by the unanimous approval of the specifications on the conditions, criteria and methods to support film production, organize festivals, create, modernize and digitize movie theatres. The achievement of the meeting was also in approving the minutes of the Executive Board meeting held on 18th July 2012. The same Board also approved a recommendation to look into pending applications for financial support on film production and on organizing festivals after the publication of the Finance law 2012.

The three adopted orders had, shortly before, been the object of a decree established in response to the provisions of article 24 of Finance law 2012 which stipulates the allocation of the assistance fund for promoting the domestic audiovisual landscape. Under this decree, support is based on complying with the rules of good governance. Among other purposes, this legal document aims at improving the quality of works; encouraging creative freedom and openness to the world and the preservation of diversity in all its linguistic, cultural and social forms; contributing to infrastructure development in the film sector; and at promoting the use of the new digital technologies. In addition, the decree provides for the establishment of three

¹ Dahir of 11 Moharem 1363 (8 January 1944) creating a Moroccan Cinematographic Center (CCM): Centre Cinématographique Marocain.

² Dahir law No. 1-77-230 of 5 Chaoual 1397 (19 September 1977) on reorganizing the Moroccan film centre

³ Law No. 20-99 on reorganizing the film industry, distribution and filming as well the management of movie theatres. It stipulates that any commercial exploitation of films on the national territory is subject to a licence delivered by the competent authority (the Moroccan film centre). This law reinforces national legislation on intellectual property. See : <http://www.wipo.int/wipolex/fr/details.jsp?id=2976>

⁴ CCM, Book of Specifications, <http://www.ccm.ma/fondcahier.asp>. AU 1er novembre 2012, only the outline of the document was available on CCM website. For a first assessment of the specifications, see *Un arsenal juridique pour hisser la qualité du cinéma marocain, Aujourd'hui*, 17 October 2012, <http://www.aujourd'hui.ma/maroc-actualite/focus/un-arsenal-juridique-pour-hisser-la-qualite-du-cinema-marocain-98802.html>

distinct committees: one to support film production, another in charge of creating, modernizing and digitizing cinemas and a third dedicated to the organization of festivals.

8.2.2. *Support Fund to domestic film production*

- Financing history of the support Fund

The creation in 1980 of the support Fund for domestic film production is regarded as one of the most important measures aiming at promoting domestic film industry. This fund allowed the sector to expand. Between 1980 and 1987, 35 feature films and 30 short films were produced with a total budget of 12,300,000 MAD.

However, given the objectives, this initial support had its limitations. Financial support was small forcing producers to resort to bank loans granted, at the time, at high rates.

Hence, in order to provide the Fund with new financial resources, a reform was introduced. In 1987, in agreement with professional societies, the Moroccan Cinematographic Center (CCM), proposed a reference to enable the Fund to have additional resources¹.

It was the beginning of the second financing period of the Fund after its reorganization, from 1988 to 2003, during which around one hundred feature films and around thirty short films were produced with an overall budget of 166 MAD² or 14,619,400 M EUR.

The new regulation establishes selective assistance by the fund before or after production, and redefines the composition and functioning of the committee for granting production assistance, the conditions of eligibility to the fund and the criteria which determine its allocation. The resources of the support fund are hence distributed as follows:

- 50% are for film production support
- 50% are dedicated to supporting operating

In order to further support domestic production, other measures were taken in 2004 which initiated the third phase of the history of financing which continues to the present.

- The Support Fund Committee

The committee for granting support to production consists of two sub-committees, one in charge of reading and selecting projects, and the other for evaluating and allocating the fund. Deadlines are set for producing projects: they are 18 months for feature films and 12 months for short films.

The benefit of the grant is lost when deadlines are not met. A post-production support is even provided for, according to special procedures. Rights of cultural exploitation of any film, whether

¹ Joint order by the Minister of Communication and the Minister of Finance laying down the procedures for the implementation of decree No. 2.87.749 (30 December 1987) establishing a special tax on film screening in favour of CCM and setting the provisions of resource allocation of the support Fund; <http://www.ccm.ma>

² Zouiten, *Financement des œuvres cinématographiques*, Support fund to domestic production, CCM, Presentation at the discussion session of Euromed Audiovisual III program at Rabat, Morocco, April 2012.

feature or short film, which has been granted assistance whether on the application or after production, belong by right to CCM for an unlimited period¹.

- *Types of support*

Article 3 of the specifications² of the Moroccan Film Centre determines the support granted to all film production. Support may take the following forms:

- *Advance on receipts* to feature and short films presented by Moroccan production companies before and after production;

- *Financial contribution to script writing and rewriting* of feature and short films.

- *A quality bonus* to feature and short films having obtained an advance on receipts before production.

- *Amount of grants*

In accordance with article 4 of CCM specifications, the advance on receipts to be granted to projects and to completed feature or short films may not exceed two thirds (2/3) of the budget evaluated by the second sub-committee, referred to in article 13 of the joint Decision governing the support fund.

- The financial contribution granted to script writing and rewriting may range between twenty thousand MAD (20,000.00) equal to 1,800 EUR and fifty thousand MAD (50,000.00) around 4,500 EUR for feature films and between five thousand (5,000.00) around 450 EUR and ten thousand MAD (10,000.00) around 900 EUR for short films.

- The quality bonus ranges between one hundred thousand (100,000.00) around 9,000 EUR and five hundred thousand MAD (500,000.00) equal to 45,000 EUR for feature films and between twenty five thousand (25,000.000) equal to 2,250 EUR and fifty thousand MAD (50,000.00) or 4,500 EUR for short films.

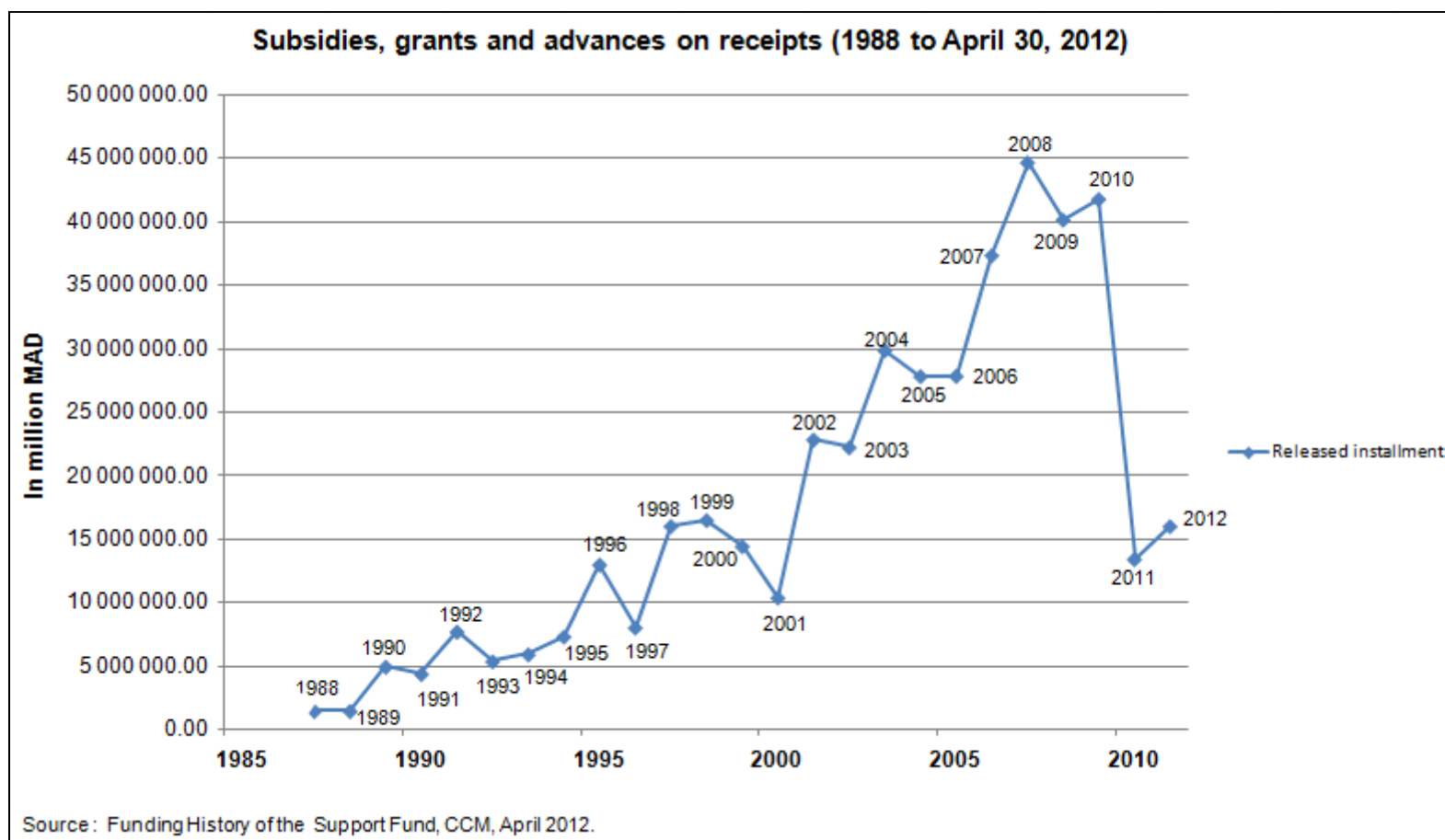
¹ Under article 28 of this Order, the cultural exploitation of any feature or short film which received an advance on receipts belongs automatically by right to the Moroccan Cinematographic Center for an unlimited period. CCM may only use these rights two years after the Committee had ruled on the last installment of the advance on receipts and also two years after the date of the grant for post production. What is meant by "right to cultural exploitation" is the non-profit screenings in Morocco or abroad, to the exclusion of any television broadcasting. See: Joint Order of the Minister of Communication and the Minister of Finance setting out the terms of application of Decree No. 2.87.749 (30 December 1987), op.cit.

² Book of Specifications of the Moroccan Cinematographic Center ; accessible at <http://www.ccm.ma>

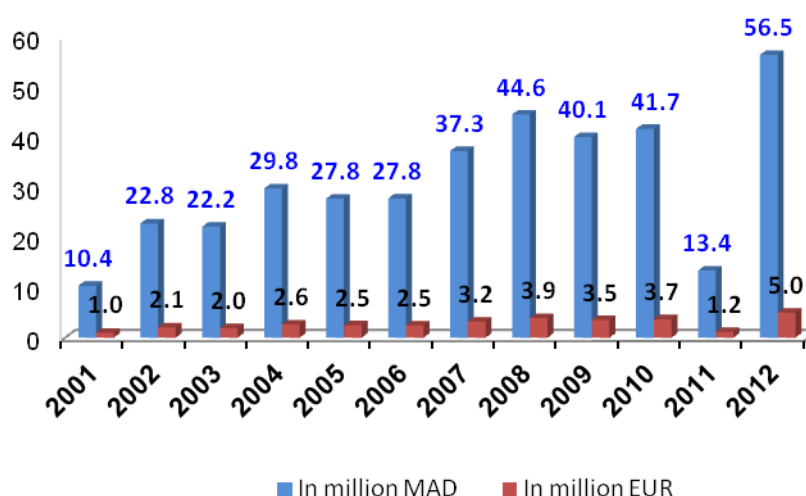
Support to production granted by CCM (1988 - 2012)

Year	Released installment in million MAD	Released installment in million EUR	FF	SF
1988	3 025 000.00	n.a	5	2
1989	1 462 500.00	n.a	3	1
1990	4 950 000.00	n.a	3	0
1991	4 375 000.00	n.a	2	2
1992	7 700 000.00	n.a	7	3
1993	5 370 000.00	n.a	3	3
1994	5 920 000.00	n.a	3	4
1995	7 325 000.00	n.a	6	3
1996	12 981 875.00	n.a	7	8
1997	8 025 000.00	n.a	5	2
1998	16 014 250.00	n.a	8	2
1999	16 480 000.00	n.a	7	5
2000	14 426 000.00	n.a	7	4
2001	10 380 000.00	1 009 530.00	4	7
2002	22 810 000.00	2 088 600.00	11	6
2003	22 200 000.00	1 955 120.00	13	8
2004	29 837 500.00	2 642 790.00	10	6
2005	27 800 000.00	2 489 240.00	14	9
2006	27 817 500.00	2 476 340.00	10	12
2007	37 312 500.00	3 244 520.00	15	7
2008	44 603 939.59	3 941 620.00	11	7
2009	40 106 846.74	3 544 210.00	15	4
2010	41 727 500.00	3 712 030.00	17	6
2011	13 412 500.00	1 202 860.00	22	6
2012	56 530 000.00	5 070 320.00	17	2
TOTAL	482 592 911.33	-	225	119

Source: CCM, Production Division, Support Fund Department, April 2012. *Film Industry Assessment – Year 2012* ; <http://www.ccm.ma/inter/phactualite/bilanfr2013.pdf>



Installments released by CCM (2001-2012)



Source: CCM

Data provided by CCM indicate that the overall total amount of bonuses, grants and advances on receipts granted between 1998 and 30th April 2012 amount to 545,424,625.00 MAD which equals 48,059,300.00 EUR. While the total advances granted until the same date amount to 531,194,625.00 MAD (46,805,500.00 EUR), that of the cancelled advances is estimated at 14,230,000.00 MAD which equals 1,253,860.00 EUR. The total advances paid including all the amounts granted during 2012, amount to 482,592,911.33 MAD which equals 43,299,700 EUR. The remaining advances to be paid in April 2012 amount to 103,607,500.00 MAD which equals 9,129,230.00 EUR. Finally, the total amounts held for non compliance with the rule of 2/3 amount to 1,524,213.67 MAD (134,304.00 EUR). The following table provides the totals of the various categories mentioned.

Advances by CCM (1988 - April 2012)

	In MAD	In EUR
General total	545 424 625.00	48 059 300.00
Total cancelled advances	14 230 000.00	1 253 860.00
Total granted advances	531 194 625.00	46 805 500.00
Total paid advances	426 062 911.33	37 541 900.00
Total amounts held for non compliance with the rule of 2/3 of budget	1 524 213.67	134 304.00
Total remaining advance to pay	103 607 500.00	9 129 230.00

Source: CCM, Production Division, Support Fund Department, Table of subsidies, grants and advances on receipts granted from 1988 to 30 April 2012. *Film Industry Assessment – Year 2012*.

*The conversion of local currency in EUR is made according to the exchange rates set by Oanda Currency Converter on 30 April 2012 ; <http://www.oanda.com/lang/fr/currency/converter/>

Film industry is eligible for the benefits of the Investment Chart. An inter-ministerial committee examines many investment projects in the film sector. Projects exceeding 200 million MAD,

around 18 million EUR, benefit from a total exemption of duties and taxes. For example, in 2001, two major projects were highlighted in Casablanca; the investment amount of the first was 200 million MAD; the other is an operating company which also loans VHS films and DVD with an investment programme estimated at 630 million MAD on 36 months (2001-2003)¹.

In CCM book adopted on 15th October 2012, the order on support to film production aims at encouraging producers to seek funding and at empowering production companies. As to the Committee of support to film production, it is required, under this order, to grant two thirds of the budget allocated by the State to films which it selects to receive this assistance. The order on support to film production also provides for supporting new talents. In this sense, the Committee of assistance to film production should give priority to first films by directors who apply for funding².

The Film Industry Assessment for 2012³ published by CCM indicates that the amount of advances on receipts granted to support domestic film production for the sessions of 2012, is fifty six million five hundred thirty thousand Dirhams (56,530,000.00) which equals 5,070,320 EUR. This includes the advance on receipts, before production, the advance on receipts after production and the grant for script rewriting.

During the three sessions of 2012, the Committee of the assistance Fund for production examined the applications of 48 feature film projects and 6 short film projects. It also watched 5 feature films and 5 short films applying for post production support and one feature film applying for the quality bonus. At the end of its deliberations, the Committee decided to grant advances on receipts to 17 feature films (13 before production, 1 after production and 3 for script rewriting). 2 short films were also awarded advances on receipts⁴.

¹ Law No.17-94 rules on the activities of production, editing, imports, distribution, reproduction and use of video recordings for private use.

² « Un arsenal juridique pour hisser la qualité du cinéma marocain », *Aujourd'hui*, 19 October 2012, <http://www.aujourd'hui.ma/maroc-actualite/focus/un-arsenal-juridique-pour-hisser-la-qualite-du-cinema-marocain-98802.html>

³ <http://www.ccm.ma/inter/phactualite/bilanfr2013.pdf>

⁴ See full list of films having received an advance on receipts for 2012: *Film Industry Assessment – Year 2012*, CCM, pp. 4-6.

8.3. Film production in Morocco

8.3.1. Hosting policy of foreign shooting

Morocco works on becoming a hub for film industry in the region. Trust and investment are the determining factors in this sector.

Among Mediterranean countries in recent years, Morocco ranked second after Egypt in terms of film infrastructure industry and attraction of foreign producers. Every year, hundreds of shooting authorizations are granted by CCM for the production of different types of films.

According to the Director General of CCM, between 2006 and 2011, Morocco succeeded to attract over 150 foreign productions draining an investment of 300 million EUR, in other words, an average of 50 million EUR per year. Four of the productions alone in this period totaled over 55% of this investment. The first, entitled *Prince of Persia* is an American super production shot in 2008 in Marrakech, Ouarzazate and Erfoud. The film, directed by the British Mike Newell, is one of the largest shootings ever carried out in Morocco. The second Super production is British and the title is *Green Zone*. The third large production filmed in Morocco is also British; it is *Body of lies* shot in 2007 in Rabat and Ouarzazate. Finally, *Sex and the City II* is the fourth major production; it is American, and was shot in Marrakech in 2009¹.

While the United States leads, with a share of 40%, the UK ranks second with 36% of investment. Germany has a share of 6%.

Morocco offers excellent shooting conditions: climate, diversity of landscapes and geographical position. Landscape in the Kingdom of Morocco is regarded as a perfect setting by Moroccan and also foreign film directors. These natural conditions have been reinforced by a number of measures undertaken by CCM to attract and promote foreign investment:

- Creation of a support fund for domestic film industry, to promote annually feature and short film shooting,
- Simplified customs procedures,
- A minimum rate of 2.5% to import film equipment,
- VAT exemption on all goods and services purchased in Morocco,
- Simplified measures for temporary importing of weapons and ammunition needed for filming,
- Open access to historical sites,
- Creation of a fund to renovate around 50 cinemas,
- Discounts provided on Royal Air Maroc.

These measures had an important impact attracting international film companies and widely contributing to the development of Moroccan film industry.

8.3.2. List of foreign feature films shot in Morocco in 2012

In 2012, 25 feature films, 8 short films, 1 TV fiction, 3 TV series, 100 documentary films as well as advertising films and TV reports were filmed in Morocco.

¹ See statements by CMM Director General Nour-Eddine Saïl in Bilatérale : *L'industrie cinématographique au Maroc*, German Chamber of Commerce and Industry in Morocco, No. 49, second quarter 2012, April 2012, pp. 26-47;
http://marokko.ahk.de/fileadmin/ahk_marokko/magazine/Bilateral_49/catalog_530146/index.html#/1

Investments for these shootings amount in Moroccan currency to 312,511,100 MMAD in other words 28,039,400 MEUR, as detailed below¹ :

Feature films

Title	Director	Nationality	Budget in MAD
EXIT MARRAKECH	Caroline Link	German	14 835 000.00
INTERSECTION	David Marconi	French	18 925 000.00
KUNDUZ	Raymond Ley	German	5 175 000.00
THE PHYSICIAN	Philipp Stolzl	German	39 375 000.00
VIVE LA France	Michael Youn	French	6 000 000.00
PARIS A TOUT PRIX	Reem Kherici	French	5 800 000.00
CAPTAIN PHILLIPS	Paul Greengrass	American	6 500 000.00
LAND	Jan Willem Van Ewik	Dutch	5 284 000.00
A THOUSAND TIMES GOOD NIGHT	Erike Poppe	French	7 200 000.00
DESERT DANCER	Richard Raymond	English	15 000 000.00
SITE 146	Gregory Levasseur	American	20 000 000.00
COMPLICIT	Niall Mac Cormick	English	2 800 000.00
DOORS OPEN	Marc Evans	English	210 000.00
DROLE DE FAMILLE	Christophe Douchand	French	4 509 150.00
GRAND DEPART	Nicolas Mercier	French	90 000.00
I TRAVEL ALONE	Donatella Botti	Italian	260 000.00
L'ARMEE DU SALUT	Abdellah Tala	French	3 000 000.00
L'AVISEUR	Julien Leclercq	French	100 000.00
LES GAMINS	Anthony Marciano	French	3 000 000.00
MIRAGE	Nathalie Marchak	French	20 000 000.00
MISERERE	Sylvain White	French	2 287 950.00
ONLY LOVERS LEFT ALIVE	Jim Jarmush	German	5 800 000.00
ORANGE PEOPLE	Hanna AzoulayHasffari	Israeli	460 000.00
IL Y A ENCORE UNE CHANCE	Holger Hasse	German	230 000.00
NE QUELQUE PART	Mohamed Hamidi	French	12 770 000.00

¹ *Film Assessment – 2012*, CCM, pp. 8-9.

TV fiction

Title	Director	Nationality	Budget in MAD
UNE BONNE LEÇON	Bruno Garcia	French	6 200 000.00

TV series

Title	Director	Nationality	Budget in MAD
COVERT AFFAIRS THIS NOT AMERICA/ HELLO STRANGER	Allan Kroeker	French	1 200 000.00
GAME OF THRONE/SEASON III	Dan Minahan	English	40 500 000.00
LA BIBLE	Christopher Spencer	English	65 000 000.00

8.3.3. Production companies

The private production sector includes several production companies which play an important role in the domestic field of film production. The following list of production companies set up by CCM indicates 21 production companies.

Film production companies in Morocco (2012)

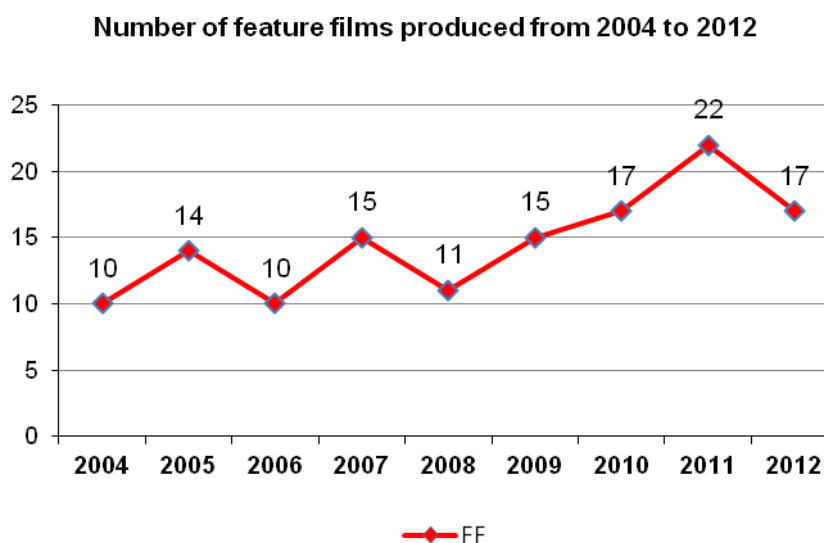
	Company	Main Office	Producer
1	Ali Baba Production	Casablanca	Mouhcine GUENNAR
2	Aflam Mustapha Derkaoui	Casablanca	Mustapha DERKAOUI
3	A-Z Productions	Casablanca	Abdelhamid ZOUGHI
4	Bentaqerla	Settat	Hassan BENJELLOUN
5	Casablanca Films Productions	Casablanca	Abdelhai LARAKI
6	Cinature	Casablanca	Saâd CHRAÏBI
7	Ciné-Magie Films Productions	Casablanca	Abdelkrim DERKAOUI
8	La Cité en Fête	Casablanca	Omar CHRAÏBI
9	Films du Sud	Rabat	Daoud OULED SAYAD
10	Heracles Productions	Tanger	Jillali FERHATI
11	Horizons Films	Rabat	Mohamed LOTFI
12	Lumières de la Ville	Rabat	Hamid BENNANI
13	Mia Productions	Casablanca	Mohamed ISMAIL
14	Moroccan Productions and Services	Casablanca	Sarim FASSI-FIHRI
15	Prod'Action	Casablanca	Hakim NOURY
16	Taghmat Films	Temara	Mohamed ABBAZI
17	Unifilms	Casablanca	Larbi BENANI
18	Zawaya Communications	Rabat	Driss CHOUIKA
19	Boulane O'Byrne Productions	Casablanca	Ahmed BOULANE
20	Hi Com Productions	n.a	Said NACIRI
21	Rabii Films Productions	n.a	Mohamed EL MAANOUNI

Source: CCM, List of members in the Moroccan Chamber of film producers.

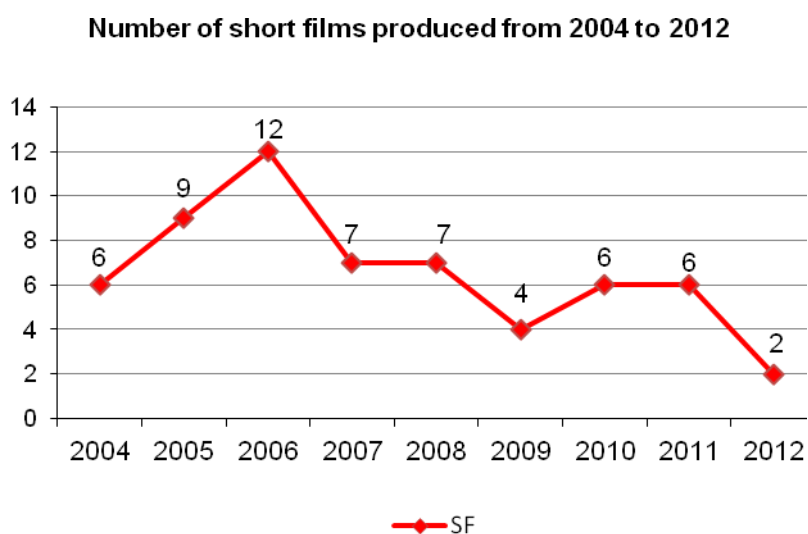
The development of the sector also owes its success to the establishment by Moroccan and foreign investors of extremely modern film studios in Ouarzazate, known as the capital of Moroccan cinema, in Casablanca and in Marrakech. Atlas Studios, Kan Zamane workshops, Cinedina Workshops, CLA Studios and Ester Andromède Studio are among the largest in the Kingdom.

8.3.4. Data on production and coproduction

Data on production are published by CCM.



Source: CCM, Production Division, Support Fund Service



Source: CCM, Production Division, Support Fund Service

8.3.5. Coproduction policy

It is important to note that 38% of feature films of Moroccan domestic cinema are coproduced. These include: *Mille mois* by Faouzi Bensaidi, *Moolaadé* by Ousmane Sambene, *la Source des Femmes* by Radu Milaihanu, *L'enfant endormi* by Yasmine Kassari and *Sur la planche* by Leila Kilani.

Data on coproduction is available in the *Census and Analysis of film & Audiovisual Co-productions in the South-Mediterranean Region 2006-2011 Report*¹.

Morocco signed coproduction and film exchange agreements with the following countries: France, Belgium, Argentina, Canada, Spain, Egypt, Italy, Tunisia, England, Côte d'Ivoire, Chad, Benin, Mali, Burkina Faso, Cameroun, Guinea and Senegal.

In addition, a coproduction and film exchange agreement links Morocco to the Arab Maghreb Union.

Number of Moroccan co productions per year and type (2006-2011)

	Fiction	Documentaries	Total
2006	4	0	4
2007	7	0	7
2008	7	1	8
2009	3	4	7
2010	4	1	5
2011	6	1	7
TOTAL	31	7	38

Source Euromed Audiovisual III (L. Rosant, 2012)

Coproduction partner countries with Morocco (2006-2011)

	Fiction	Documentaries	Total
France	20	3	23
Belgium	8	1	9
Germany	6	0	6
Italy	4	2	6
Canada	3	2	5
U.A.E.	2	1	3
Algeria	2	0	2
Netherlands	2	0	2
Egypt	1	0	1
Lebanon	1	0	1
United States	1	0	1
Spain	1	0	1
Switzerland	1	0	1

Source Euromed Audiovisual III (L. Rosant, 2012)

¹ L. ROSANT, *Census and Analysis of film & Audiovisual Co-productions in the South-Mediterranean Region 2006-2011*, EUROMED AUDIOVISUAL III, Tunis, May 2012.
<http://euromedaudiovisuel.net/Files/2012/05/29/1338310192044.pdf>

As part of the implementation of coproduction and film exchange agreements with the various countries, CCM contributed in 2012 in making the following film:

Production	Film	Director	Country
CNCM	Toiles d'Araignées	Ibrahim Touré	Mali

Besides, CCM is involved in 2012 in the production of the following films (not released) until CCM film assessment 2012 is published.

Production	Film	Director	Country
AFRIK COM	Ultimatum	Djakaridja Diarrassouba	Côte d'Ivoire
CINEKAP	Aujourd'hui	Alain Gomis	Senegal
LES FILMS DJOLIBA	Morbayassa	Cheick Fantamady Camara	Guinea
LES FILMS SELMON	Moi Zaphira	Apolline Traoré	Burkina Faso
LIKODA Sarl	Pour Christine	Bernard D. Nagmo Dowouo	Cameroun
BRAVA - FLORIDA	Le temps d'aimer	Ana Ramos Lisboa	Cape-Verde
LES FILMS MAME YANDE	Le complot	Ousmane William Mbaye	Senegal

Source: *Film Industry Assessment- 2012*, CCM, p.15

8.3.6. The film capital : Ouarzazate

For all major productions we have mentioned, the main sites for shooting in the last six years have been, in a decreasing order of investment: Ouarzazate, 45%; Rabat-Casablanca 22%; Marrakech 17% and other sites 16%¹.

The unique and important advantages of Ouarzazate: a highly advanced industry infrastructure (studios, equipment, shooting and editing devices, etc.), skilled labor, competent staff, great variety of cultural expression and gorgeous landscapes attract companies to the film capital.

Despite these positive factors which play an important role in concentrating production activities at Ouarzazate, there is a gap in the marketing process and in the organization of staff that has to be filled.

In order to better use the advantages of the film capital Ouarzazate, a Film Commission was created on 28th January 2008 to make up for the deficiencies in marketing, and to facilitate access to filming in Morocco. It is responsible for assisting foreign investors, organizing the

¹ Ibid.

sector and marketing Ouarzazate as a special filming site. The Commission promotes adequate conditions for the development of the sector based at Ouarzazate.

The Commission also provides film societies with logistical support in identifying shooting locations. It promotes the use of local resources and brings the film industry closer to tourism. In the same framework, Ouarzazate Film Commission has set the goal of increasing the number of shootings from 57 in 2005 to 225 in 2016 and of creating 8,000 new jobs in the region.

8.4. CCM assessment 2010 - 2011 - 2012

Morocco has for a few years been defending its status as a filming destination at the international level and is developing in this regard thanks to favorable measures facilitating the process to foreign investors.

- Authorized shootings

In total, during 2010, CCM issued 1,452 filming permits. 718 were for Moroccan productions and 734 for foreign productions. The following table provides the number of shooting permits in the different categories:

Film shooting permits - 2010		
Category	Moroccan production	Foreign production
Feature films	40 17 Cinema/ 23 Video	14
TV fiction	21	4
Medium-length films	4	0
Short films	78	14
TV series	16	3
Documentary	54	110
Report	100	447
Music programme/Clip	141	4
Advertising spot	172	27
Television programme	36	99
Sit-Com	6	0
Institutional film	35	12
Report capsule	3	0
Sketch	10	0
Play	2	0
Total	718	734

Source: CCM, *Film Industry Assessment- 2010*; Status shooting authorizations – 2010.

For the period extending to 31st December 2011, CCM authorized 1,471 shootings of different production categories. Almost half of them were granted to Moroccan productions and the other half to foreign productions. It should be noted that in 2011, Morocco was the site for 9 feature film shootings including the German production *Auslandseinsatz- Mission Abroad (Mission à l'étranger)*, and the French *L'Affaire Gordji*.

Film shooting permits - 2011		
Category	Moroccan production	Foreign production
Feature films	32 19 Cinema/ 13 Video	9
TV Fiction	10	6
Short films	105	12
Medium-length films	1	0
Documentaries	50	95
Musical programmes	140	11
Report capsule	110	460
TV programme	45	90
Advertising spot	200	20
Sit-Com	4	0
Institutional film	25	7
TV series	23	5
Sketch	11	0
Total	756	715

Source: CCM, *Film Industry Assessment -2011*; Status shooting authorizations – 2011.

The 2012 film assessment indicates that 1,431 shootings were authorized during the year in the different categories. While 732 authorizations were granted to Moroccan productions, 699 were for foreign productions shooting in Morocco.

Film shooting permits - 2012		
Category	Moroccan	Foreign
Feature films	36 18 cinema / 18 video	25
TV Fiction	10	1
Short films	122	8
Medium-length films	2	0
Documentaries	62	100
TV Series	2	0
Reports	107	414
Television programme	65	102
Music	107	1
Clip	18	9
Advertising spot	143	26
Sketch	8	0
Sit-Com	4	0
Institutional film	23	10
Capsule reportage	11	0
TV Series	12	3
TOTAL	732	699

Source: Film Industry *Assessment - 2012*, CCM, Shooting authorizations, p.10

8.5. Film distribution

8.5.1. Distribution companies

There are 31 licensed distribution companies most of which have their main offices in Casablanca¹. 13 of them are operational. They are the following² :

Company name	Office
Canal 4	Casablanca
Centrale Africaine Cinématographique	Casablanca
Euroma Films	Casablanca
HICOM	Casablanca
First Poly-Production	Laayoune
Maghreb Moderne Films	Casablanca
Master Ciné Films	Casablanca
Megarama Maroc	Casablanca
Sodican	Casablanca
Younès	Casablanca
ZAZA Films	Casablanca
Al Amine D'Investissement Immobilier	Casablanca
New Century Film SARL	Casablanca

8.5.2. Distribution of foreign films in Morocco

The distribution of foreign films in Morocco must occur under a contract between a Moroccan distributor and the producer or distributor of the foreign film, duly bearing CCM Stamp³.

According to the *Film Industry Assessment 2011*, CCM entered 213 films in the register of imported films. It also delivered 183 film operating licences including 25 Moroccan films and 1,632 cultural operating licences to films of various nationalities.

During 2012, the Centre registered 141 foreign films on the “foreign film register”. It also delivered 137 film operating licences including to 21 Moroccan feature films and 1 commercial.

¹ See List of authorized distribution companies (Cinema), CCM : <http://www.ccm.ma/pdf/sda.pdf>

² See List of operational film distribution companies : <http://www.ccm.ma/pdf/sdo.pdf>

³ <http://www.oc.gov.ma/portal/content/informations-pratiques/importateur-de-services#l-6>

Concerning films and audiovisual programmes recorded on video, as highlighted in Film Industry Assessment 2012, the Moroccan Film Centre accomplished what follows:

- Registration of 3044 foreign films in DVD on the “imported film register”
- Registration of 3 foreign films on VCD on the “imported film register”
- Delivery of 1222 operating licences in DVD including 1086 imported films, 23 Moroccan feature films, 1 documentary, 8 sketches et 104 musical entertainment
- Delivery of 138 operating licences in VCD including 17 Moroccan feature films, 4 TV fictions, 8 sketches et 105 musical entertainment.

Besides, 143 385 DVD and 1 128 000 VCD were hallmarked. CCM delivered 1,404 cultural licences to films of various nationalities¹.

8.6. Film operating

8.6.1. Cinemas

In 2011, CCM counted 68 active movie theatres. 23 of them were in the two multi-cinema Megarama complexes (respectively 14 in Casablanca and 9 in Marrakech).

With an investment of around 20 million EUR, the French group Megarama made its first steps on the African continent by opening the first multi-cinema complex in Morocco: Megarama in Casablanca. It has 14 cinemas, and opened in 2002.²

The second multi-cinema unit of the same group opened in 2006 in Marrakech with 9 cinemas. Admission fee went up from 30 MAD in 2002 to 50 MAD in 2011³.

According to CMM figures, receipts of ticket sales for 2011 reached 68 million MAD including 38 million MAD earned by Megarama multi-cinema units. Success signs are then visible for the Megarama group in Morocco taking 60% of income turnover and 40% of ticket sales in the Kingdom.

¹ *Film Industry Assessment – 2012*, CCM, p. 24

² « Cinéma. Megarama, méga... succès », *Telquel*, 22 May 2012, <http://www.telquel-online.com/Actualites/Economie/Cinema-Megarama-mega-succes/523>

³ Amira Khalfallah and Layal Ghanem, *Megarama Grandeur et Décadence*, in *Actuel, l'esprit ouvert*, 20 January 2012, http://www.actuel.ma/Tendances_Culture/Megarama_Grandeur_et_decadence/887.html

8.6.2. Operating cinemas – 2012

City	Cinema	Admissions	G.B.O in MAD
CASABLANCA	Megarama Multiplex	844667	35 924 608.43
	Imax	144691	8 083 945.00
	Lynx	71499	1 790 831.42
	Lutetia	58342	1 089 881.45
	Multiplex Eden Club	36938	868 280.97
	Rialto	34546	1 107 671.45
	Al Malaki	29776	202 056.39
	Ritz	27227	760 531.87
	Rif	15264	446 105.98
	Abc	14025	371 822.65
	Verdun	4870	58 970.63
MARRAKECH	Multiplex Megarama	187111	7 828 640.43
	Mabrouka	56103	968 510.43
	Le Colisée	53685	1 283 844.23
	El Massira	26650	427 344.00
	El Hillal	5969	45 399.41
RABAT	Royal	91221	2 197 272.47
	7eme ART	32529	627 074.00
	Fairouz	20690	331 405.15
TANGIERS	Le paris	43730	633 799.03
	Roxy	39130	794 217.70
	Mauritania	31872	399 204.00
	Rif	4620	68 950.44
MEKNES	Camera	29614	558 466.60
	A B C	10563	161 264.46
	Dawliz (Meknès)	2777	31 770.00
TETOUAN	Avenida	28011	889 064.91
	Espagnol	19908	487 082.08
FES	Rex	12614	321 980.32
	Empire / LUX	5673	206 960.00
OUJDA	Colisée	8186	55 044.54
	Royal	5257	42 591.60
	Vox	3292	29 544.21
AGADIR	Sahara	6086	27 003.18
SETTAT	Al ahram	3057	41 351.09
ASSILAH	Magali	1101	10 191.68
GRAND TOTAL		2 011 294	69 172 682.20

Source: *Film Industry Assessment- 2012*, CCM, p. 18.

*As highlighted in the Assessment, it is worth noting that these figures are not final, CCM not having received to this date all the income statements from cinemas.

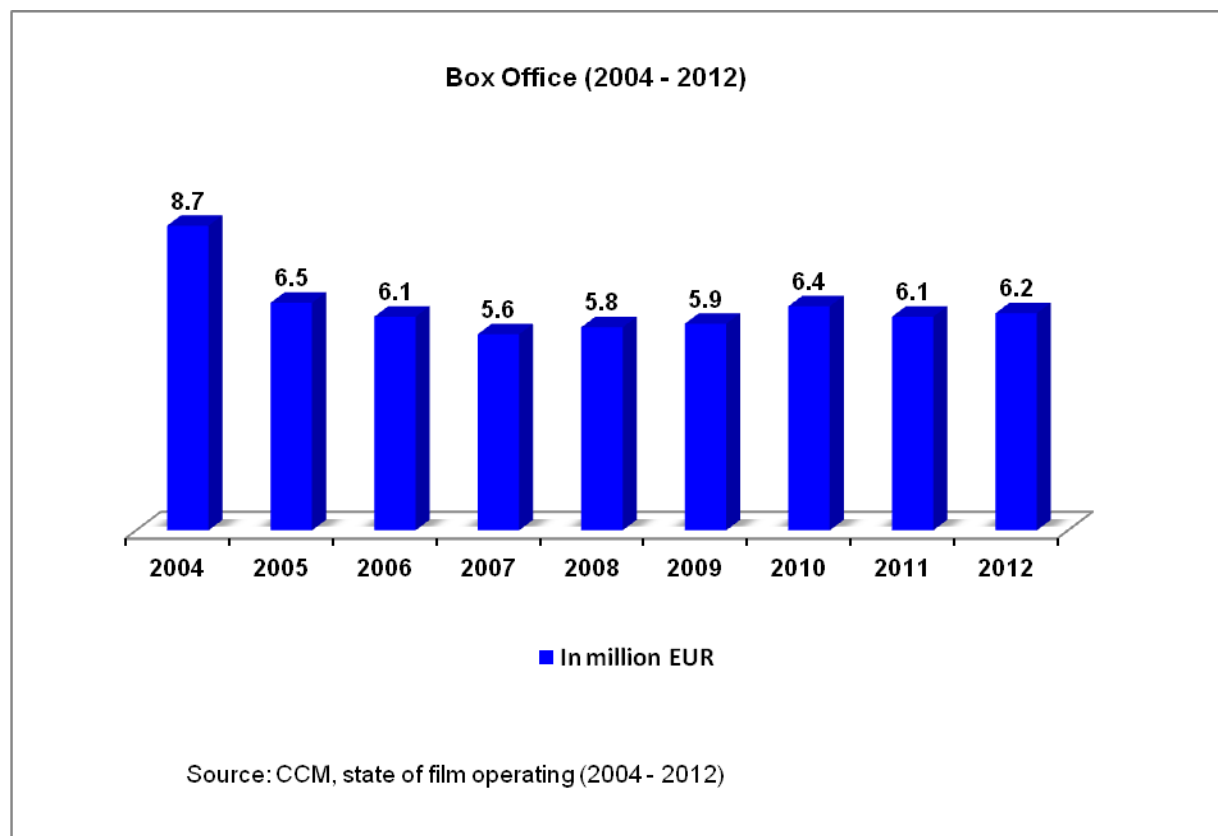
8.6.3. Collapse of attendance

Despite the success of Megarama multi-cinema units, admissions collapsed in the entire Kingdom from 6.8 million in 2004 to 2 million in 2012; resulting in a drop in the box office from 8.8 to 6.2 million EUR.

Film operating from 2004 to 2012

Year	Admissions	Box Office in million MAD	Box Office in million EUR
2004	6 794 345	99 186 347	8 785 200
2005	4 763 738	72 646 910	6 504 880
2006	3 854 942	69 153 821	6 156 130
2007	3 376 452	64 433 392	5 602 830
2008	2 960 877	66 101 274	5 841 320
2009	2 638 707	68 323 258	5 981 950
2010	2 535 829	72 504 044	6 449 880
2011	2 248 542	68 051 518	6 103 020
2012	2 011 294	69 172 682	6 206 380

Source: CCM, statistics of cinema operating 2004-2012.



8.6.4. Issues of the operating business

Any film industry rests on three fundamental pillars: production, distribution and operating. Unlike the thriving and vibrant production sector, the film distribution and operating sectors in Morocco are presently in crisis.

In 1982, there were in Morocco 246 movie theatres making 45 million admissions and a turnover of 118 MMAD. In 2011, there are only 68 movie theatres, making only 2.2 million admissions and a turnover of 68 MMAD which equals 6 MEUR.

For indicative purposes, the table below compares Morocco with the most film-loving countries in terms of admissions:

country	Admissions in millions	Population in millions	Coefficient
Morocco 1982	45	16	2.8
Morocco 2010	2.5	31	0.08
France 2010	201	63	3.19
USA 2010	1 420	330	4.3
India 2010	7 300	1 166	6.26

Source: *Plaidoyer pour la Culture: Le Cinéma, État des lieux*, p.8.

According to these statistical details, the attendance coefficient in movie theatres in 1982 (ratio of admissions/population in the country) was similar to that of a developed country; it is presently near zero, while in the countries under comparison it has been steadily increasing. France reached the record figure of 215 million admissions in 2011¹.

After production, the following stage takes places in the movie theatre and includes marketing, programming, maintenance of the building, attracting audience and cashing income. Since the 1980's the decline of cinemas in Morocco is a major problem affecting the vibrancy of the production sector in the Kingdom and the will to turn Morocco into a platform of Arab and international film industry. While there were 246 cinemas 1982, their number has fallen to 124 in 2006 reaching 68 presently in the whole country².

In average, seven cinemas close every year. Their revenue has reached a minimum level, rarely exceeding one million MAD, due to low attendance with entries often not exceeding 600 to 700 per week. Worse even is the fact that 75% of cinemas seem to no longer meet the minimum professional standards required for film screenings.

Causes of cinema crisis

The report *Plaidoyer pour la culture* (advocating for culture) lists the following factors as causing the failure of the operating/distributing business in Morocco:

¹ *Plaidoyer pour la Culture, le Cinéma, État des lieux*, a collective work by professional societies, CCM documentation, 2011.

² *Film industry assessment- 2011*, Moroccan Cinematographic Centre, Rabat, p.22.

a) Price control

Long years of State control of admission tickets resulted in a gap with the actual amount of investment, and in an under equipment of cinemas. Even after prices had been liberalized in the 1980's, European equipment rates no longer matched the economic level of Moroccan market.

Excessive customs duties with a non refundable 20% VAT made things even worse and hindered efforts to modernize cinemas. In addition, distributor share in ticket prices was between 25 and 50% of revenue. In consequence, movie theatres had in fact only 40% of their turnover, in order words of the total sale of tickets. Such a small share can by no means enable them to meet their financial costs, make regular effective maintenance and/or modernize.

Distribution of admission ticket fare

Designation	%	<u>Ticket in MAD</u> <u>25.00</u>
Support fund to operating	5.0%	1.25
Support fund to production	5.0%	1.25
Tax for CCM	5.5%	1.38
Tax for national solidarity	5.5%	1.38
Tax for Palestine 0.20 MAD	0.8%	0.20
Copyright compensation	1.0%	0.25
Distributor	38.0%	9.50
Movie theatre	39.2%	9.80
TOTAL	100%	25.00

Source: *Plaidoyer pour la Culture: Le Cinéma*, op.cit. p.9

According to the same source, because the industry is not tax producer, there is no way it may recover VAT on investment or purchases, which significantly increases investment and maintenance expenditures.

It is worth noting that as a measure to ease the burden of investors and cinema owners, customs duties on EU products have been brought down to 0% from 1st March 2012 and that the Finance Law 2012 included replacing parafiscal charges by a 20% VAT on ticket sales.

b) Piracy

Piracy is one of the major difficulties of the film sector in Morocco. It is an unfair informal competition representing a real threat to movie theatres.

According to the exchange Office, 50 million blank DVDs enter Morocco every year from China. DVD imports are made in a perfectly legal way and are paid for in Moroccan currency. Then, films are burned to the DVDs which are sold on the black market at 5 or 7 MAD (0.44 or 0.62

EUR) depending on quality. According to estimations, pirates' turnover is around 250 MMAD (22 MEUR); an amount which annually escapes Moroccan tax authorities¹.

Moroccan films are pirated in the very cinemas which screen them with clever systems by which fraudsters acquire copies at the same time as the national release of films. Trying to beat pirates, Megarama set a policy in Morocco to obtain film operating rights at the same time as European or US cinemas².

According to some observers, the magnitude of the problem requires deeper analysis: piracy should not only be regarded in terms of repression but requires deeper understanding of its economic and cultural causes³. Despite the law under which piracy is a crime⁴ and the legal texts which amend and supplement it, and according to which a fraudster may be sentenced to two years of prison and a fine of 60 million cents, justice is rarely achieved in the field of piracy and cybercrime in Morocco.

c) Audience

At the request of the Moroccan film centre (CCM), the consultancy firm "Valyans" examined the state of the sector⁵. It examined all the technical tasks from distribution to production. The analysis aimed at implementing a development plan for the film industry in Morocco.

The exogenous factors in the report were the following:

- Emergence of new substitute products replacing movies:
 - Access to satellite programmes
 - Availability of latest movies in pirated DVD/DIVX
 - Better programmes on domestic channels
 - Emergence of new hangouts
- Low purchasing power of the industry's main target group (young people) and diversity of available spending objects.
- Feeling of lesser security following the attacks of May 2003.

One of the major revelations of the study then is that going to the cinema is not part of the leisure habits of Moroccans. In fact, according to the same source 60 % of Moroccans are absolute non movie goers, which means that they go less than once a year to the movies or never go at all.

This surprising result is to be combined to the decreasing number of cinemas and their state of disrepair, to the poor quality of attendance in neighbourhood cinemas, to the programmes which

¹ Paola Frangieh, « SOS Salles de cinéma en détresse » in *Le Soir Echos*, 12 January 2012, <http://www.lesoir-echos.com/sos-salles-de-cinema-en-detresse%E2%80%89/culture/39428/>

² Statements by Mr. David Frauciel, general director of Megarama Casablanca to *Bilatéral: L'industrie cinématographique au Maroc*, op.cit., p 29.

³ See for example, A. BENCHENNA, "Les produits culturels issus de la contrefaçon au Maroc: outils de renforcement de la dépendance culturelle?" in T. MATTELART *Piratages audiovisuels: Les voies souterraines de la mondialisation culturelle*, INA-De Boeck, Paris-Bruxelles, 2011. See also T. MATTELART, "Audiovisual Piracy, Informal Economy, and Cultural Globalization", in *International Journal of Communications*, 6, 2012, <http://ijoc.org/ojs/index.php/ijoc/article/view/1164/728>

⁴ Law No. 2-00 on copyright and neighbor rights (enacted by Dahir No. 1-00-20 of 9 Kaada 1420 (15 February 2000). Law No. 34-05 amending and supplementing Law No. 2-00 on copyright and neighbor rights (enacted by Dahir No.1-05-192 of 14 February 2006) See http://www.wipo.int/wipolex/fr/text.jsp?file_id=136955

⁵ Assessment and strategic survey to develop the film sector in Morocco, Moroccan Film Centre (CMM), April 2007, <http://www.ccm.ma/interphactualite/modetude.pdf>

do not meet audience expectations in terms of quality and novelty (except Megarama), to taxes burdening the sector, to customs duties and to piracy. All these elements contribute to enhancing the crisis of the operating/distribution field plaguing the film industry in Morocco.

The authors of the study believe that the withdrawal of the public is rooted in the following factors: ticket price increase; poor screening quality (poor quality of picture and sound) added to the state of disrepair of cinemas, to their distance from potential audience (most cinemas are concentrated in urban centers excluding the rural population from film viewing). In addition, as Moroccan and foreign films are available in the illegal networks before their official release, attempts by Moroccans to attend the movies are completely annihilated.

It should be noted that, in order to bring cinema closer to the public, especially in the regions with no cinemas, CMM organizes itinerant screenings called 'film caravans'. The tradition actually dates back to the period of French Protectorate and is maintained by CMM in order to enrich cultural and arts events and film festival programmes. In total, in 2011, caravans carried out 67 tours around the Kingdom¹.

According to the authors of the study, Moroccans generally enjoy the pleasure of attending shows and would prefer viewing a film at the cinema than in an individual setting provided they are attracted to an adequate location, and provided the ticket is affordable and comfortable conditions are provided to enjoy the cinema.

8.6.5. *Support to operating*

An assistance policy to the sector is set up in order to promote film industry in the Kingdom.

- To strengthen film industry in Morocco and CCM means of action, a 10% parafiscal tax on admissions revenue benefits concurrently, half each, the Fund to support production and cinema owners willing to renovate their movie theatres².
- Concerning the support system to cinema owners, the awarding rules require that cinema owners pay CMM an amount which equals 50% of the parafiscal tax established for the benefit of CMM on film screening. The remaining 50% are transferred by the owner to a bank account exclusively open for this purpose in the name of the cinema and dedicated to reinvestment expenses, renovation, and maintenance of the cinema or group of cinemas owned by the operator.

While cinema digitization progresses at a quick pace in the EU especially in Francophone countries (France, Belgium, and Luxembourg), transition in Morocco has not yet started. As early as 2010 a call for cinema digitization was launched at the celebration of National Film Day, "National cinema and the challenges of the digital, part of a participatory approach".³

¹ *Film Industry Assessment - 2011*, Screenings of film caravans, Centre Cinématographique du Maroc, op.cit., p.33.

² It should be noted in this regard that new cinemas are exempted from it during 10 years while exemption is 5 years for those which are renovated – in total, around forty cinemas benefited from this funding for their renovation. Besides, a minimum duty and tax rate of 2.5% is applied on cinema equipment. See : Sehim, Mustapha, *Les entreprises culturelles au Maroc*, op.cit, p.33.

³ « *Appel à la numérisation des salles* », *Maghress*, 21 October 2010. <http://www.maghress.com/fr/aujourd'hui/78783>

CCM specifications for 2013 include action for cinema digitizing. The text of these specifications is not available at the time of writing of the present report. According to *Aujourd'hui*,¹ *“With regard to the text dedicated to digitizing, modernizing and creating cinemas, it aims at consolidating transparency in the field of film promotion and of distribution opportunities by ensuring a diversity of offers. This decision tends also to ensure a variety of offers and to increase the number of cinemas in a framework of fair distribution of cultural structures nationally and regionally.”*

8.6.6. Data on film success

Cinema owners and distributors share data on film success (in revenue and admissions) with CMM which establishes statistics on Moroccan, Arab and foreign films, and publishes them in its *Film Industry Assessment* accessible on its website.

¹ « Un arsenal juridique pour hisser la qualité du cinéma marocain », *Aujourd'hui*, 19 October 2012 ; <http://www.aujourd'hui.ma/maroc-actualite/focus/un-arsenal-juridique-pour-hisser-la-qualite-du-cinema-marocain-98802.html>

Box Office of Moroccan films - 2011

	Title	Admissions	Box Office in MAD	Box Office in EUR
1	NHAR TZAD TFA DOW	75307	2 450 495	219 766
2	LES AILES DE L'AMOUR	71388	2 221 161	199 199
3	FEMMES EN MIROIRS	45286	1 355 936	121 604
4	MAJID	39377	1 101 857	98 817
5	PEGASE	21932	670 249	60 109
6	LE BOUT DU MONDE	20725	574 672	51 537
7	LA MOSQUEE	17193	271 052	24 308
8	LA 5ème CORDE	16692	553 755	49 662
9	FISSURES	13289	176 296	15 810
10	AGADIR BOMBAY	9458	60 289	5 406
11	LES ENFANTS TERRIBLES DE CASA	8840	143 344	12 855
12	LARBI	8280	259 170	23 243
13	OMAR M'A TUER	7185	285 950	25 644
14	LE CLANDESTIN	6943	150 410	13 489
15	UN FILM	6939	219 808	19 712
16	LES CASABLANCAIS	6741	21 525	1 930
17	KANDISHA	6279	184 884	16 580
18	SWINGUM	5148	127 406	11 426
19	AMOURS VOILES	4168	69 884	6 267
20	AD-DAR LAKBIRA	3839	70 210	6 350
21	LES JARDINS DE SAMIRA	3200	32 485	2 913
22	LES GARS DU BLED	2605	56 740	5 088
23	MOROCCAN DREAM	2311	21 633	1 940
24	HISTOIRE D'AMOUR	2281	39 411	3 534
25	DESTINS CROISES	2241	20 247	1 815
26	LES OUBLIES DE L'HISTOIRE	2059	35 555	3 188
27	CASABLANCA DAY LIGHT	1942	70 934	6 361
28	TERMINUS DES ANGES	1898	114 270	10 248
29	LE TEMPS DES CAMARADES	1805	24 960	2 238
30	RIH AL BAHR / PARFUM DE MER	1723	23 958	2 148
31	THE END	1426	55 730	4 998
32	ALI ZAWA	1413	19 650	1 762
33	NOS LIEUX INTERDITS	1392	27 040	2 425
34	LES AMOURS DE HAJE MOKHTARE SOLDI	1281	17 637	1 581
35	JUGEMENT D'UNE FEMME	1241	17 055	1 529
36	KHAFAYA	1187	16 500	1 479
37	LES AMIS D'HIER	1120	15 594	1 398
38	CASABLANCA BY NIGHT	1024	14 088	1 263
39	ELLE EST DIABETIQUE ET HYPERTENDUE	852	11 679	1 047
40	LES VOISINES D'ABOU MOUSSA	721	10 050	901
41	PLASTIQUE	649	22 500	2 017
42	DES L'AUBE	642	9 960	893
43	TRESSES	548	7 605	682
44	MONA SABER	513	7 068	633
45	LA SYMPHONIE MAROCAINE	438	8 915	799
46	NANCY ET LE MONSTRE	432	16 635	1 491
47	ITTO TITRIT	137	3 820	342
	TOTAL	432 090	11 690 071	1 048 427

Source: *Film Industry Assessment – 2011*, Box Office of Moroccan films, CCM.

*Box Office revenue in MAD is converted in EUR according to the rate of exchange set by Oanda currency converter on 31 December 2011.

Box Office of the first thirty films - 2011

	Title	Origin	Admissions	Box Office in MAD	Box Office in EUR
1	NHAR TZAD TFA DOW	MOROCCO	75307	2 450 495	219 766
2	LES AILES DE L'AMOUR	MOROCCO	71388	2 221 161	199 199
3	AV. DE TINTIN LE SECRET DE LA LICORNE	USA NZ	32110	1 637 738	146 876
4	HARRY POTTER ET LES R. DE LA MORT/2	USA GB	39333	1 602 180	143 687
5	BONNE SOIRÉE	EGYPT	45501	1 509 793	135 402
6	FEMMES EN MIROIRS	MOROCCO	45286	1 355 936	121 604
7	ZAHAYMER	EGYPT	41411	1 335 364	119 759
8	VERY BAD TRIP 2	USA	27449	1 299 835	116 572
9	PIRATES DES CARAIBES:F. DE JOUVENCE	USA	30268	1 287 800	115 493
10	FAST AND FURIOUS 5 / FAST FIVE	USA	20659	1 276 585	114 487
11	BOLBOL HAYRANE	EGYPT	36658	1 153 443	103 444
12	TWILIGHT-CHAPITRE 4: REVELATION (P.1)	USA	22957	1 148 355	102 987
13	MAJID	MOROCCO	39377	1 101 857	98 817
14	LOVE ET AUTRES DROGUES	USA	13787	1 030 809	92 445
15	X-LARGE	EGYPT	18964	1 014 610	90 992
16	THE TOURIST	USA / FR	17292	929 540	83 363
17	SEX FREINDS	USA	18947	892 350	80 028
18	LE DERNIER DES TEMPLIERS	USA	17341	749 625	71 263
19	JOHNNY ENGLISH/ LE RETOUR	FR/ USA/GB	13275	784 145	70 324
20	CRAZY, STUPID, LOVE	USA	15807	774 740	69 480
21	AU-DELA	USA	14663	714 015	64 034
22	SANS IDENTITE	FR/GR/CA/ JA/AME/ALL	16325	692 998	62 149
23	PEGASE	MOROCCO	21932	670 249	60 109
24	DESTINATION FINALE 5	USA	12025	660 605	59 244
25	IL N'EST JAMAIS TROP TARD	USA	7468	654 315	58 680
26	X-MEN: FIRST CLASS	USA	12824	630 280	56 525
27	L'INCROYABLE HISTOIRE DE WINTER	USA	6459	615 830	55 229
28	LES TROIS MOUSQUETAIRES	FR/GB/USA/ ALL	10263	604 365	54 200
29	CONTAGION	UAE/ USA	5385	579 690	51 988
30	LE BOUT DU MONDE	MOROCCO	20725	574 672	51 537

Source : *Film Industry Assessment – 2011.*

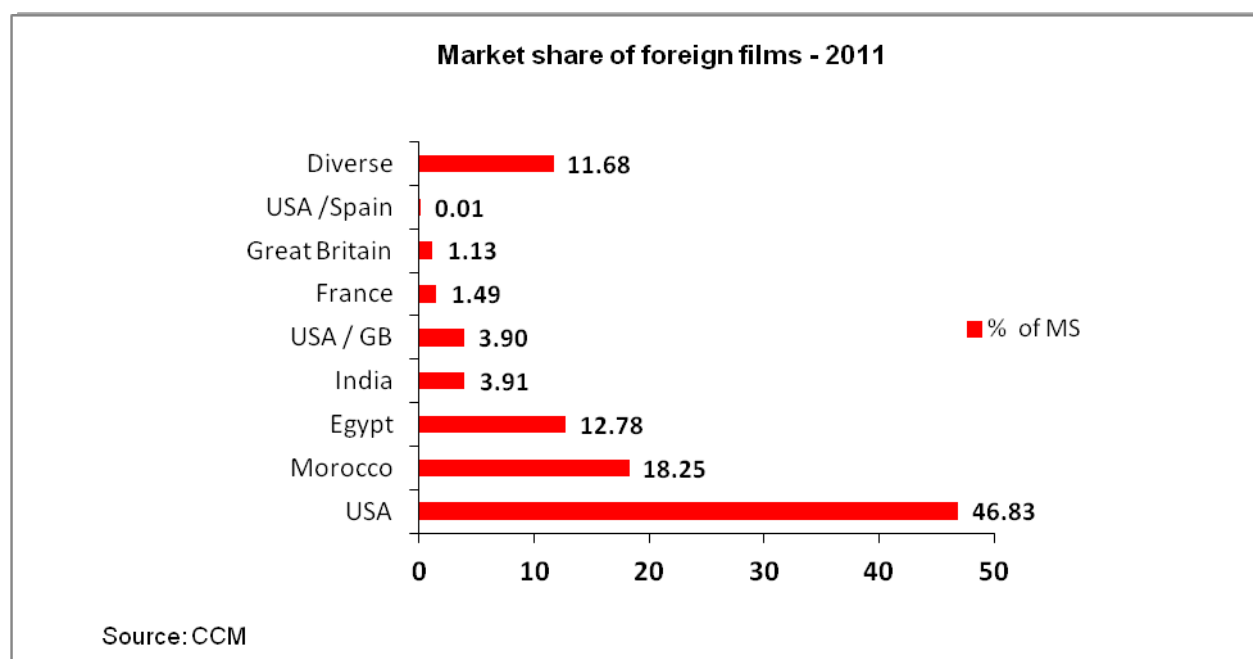
*The conversion of local currency in EUR is carried out in accordance with the rate of exchange set by Oanda Currency Converter on 31 December 2011.

Box Office per nationality – 2011

Country of origin	Number of films	Admissions	% compared to total number	Box office in MAD	Box office in EUR	% compared to total number
USA	169	752 655	40.68	26 723 817	2 396 660	46.83
Morocco	38	366 291	19.80	10 415 396	934 077	18.25
Egypt	44	277 169	14.98	7 295 585	654 285	12.78
India	165	160 759	8.69	2 230 870	200 070	3.91
USA / GB	9	62 074	3.35	2 229 926	199 985	3.90
France	15	24 694	1.68	847 925	76 043	1.49
GB	4	17 161	0.93	647 852	58 100	1.13
USA /Spain	1	216	0.01	1 732	155	0.01
Others	101	189 136	10.22	6 666 579	597 875	11.68
TOTAL		1 850 155	100%	57 059 682	5 117 250	100%

Source: *Film Industry Assessment - 2011*, Box Office per nationality, CCM.

* Box Office revenue in MAD is converted in EUR according to the rate of exchange set by Oanda currency converter on 31 December 2011



Box Office of Moroccan films - 2012

	Film	Admissions	Box Office in MAD	Box Office in EUR
1	ROAD TO KABOUL	230 519	7 759 659,00	696 220
2	UN MAROCAIN A PARIS	90 901	2 589 354,25	232 325
3	DIABETIQUE 3	42 080	1 253 292,70	112 449
4	ZERO	39 795	1 265 235,00	113 521
5	L'AMANTE DU RIF	28 321	755 576,04	67 792
6	ANDALOUSIE MON AMOUR	23 322	547 206,87	49 096
7	MAINS RUDES	20 539	530 962,60	47 639
8	AGADIR BOMBAY	20 100	450 688,22	40 437
9	FEMME ECRITE	17 000	509 695, 00	45 731
10	LE RETOUR DU FILS	16 730	423 650,65	38 011
11	CHATIMENT	14 910	349 270,44	31 337
12	SUR LA PLANCHE	11 531	353 985,39	31 760
13	LES HOMMES LIBRES	10 869	76 899,20	6 899
14	MORT A VENDRE	10 537	275 126,10	24 685
15	ANDROMANE	9 528	286 315,48	25 689
16	NHAR TZAD TFA DOU	9 191	159 527,93	14 313
17	SOURCE DES FEMMES	8 662	172 026,94	15 434
18	HORS ZONE	8 324	235 061,12	21 090
19	LES AILES DE L'AMOUR	8 265	165 166,47	14 819
20	AMOURS VOILEES	6 856	142 845,51	12 816
21	LES GARS DU BLED	5 673	107 177,61	9 616
22	LA VIE DES AUTRES	4 727	152 505,00	13 683
23	LE BOUT DU MONDE	4 616	80 131,54	7 189
24	THE END	4 453	86 939,45	7 800
25	LES ENFANTS TERRIBLES DE CASA	4 232	55 069,04	4 940
26	LES JARDINS DE SAMIRA	3 812	67 123,25	6 022
27	PEGASE	3 756	58 463,65	5 245
28	CASA BY NIGHT	3 413	86 592,25	7 769
29	LA GRANDE VILLA	2 900	22 809,23	2 046
30	MAJID	2 490	12 357,60	1 108
31	LE CLANDESTIN	2 454	31 770,91	2 850
32	LARBI	2 282	24 092,97	2 161
33	MEMOIRE D'ARGILE	1 650	46 055,00	4 132
34	MAROCK	1 305	18 261,00	1 638
35	ROAD NINE	1 021	42 000,00	3 768
36	DESTINS CROISES	861	12 436,89	1 115
37	MOROCCAN DREAM	773	3 058,79	274
38	LA 5 ème CORDE	526	9 252,00	830
39	LA MOSQUEE	463	5 642,55	506
40	YASMINE ET LES HOMMES	417	6 090,27	546
41	CASA DAY LIGHT	377	8 948,25	803
42	ITTO ITTRIT	366	8 135,00	730
43	OMAR M'A TUER	184	3 312,00	297
44	UNE HISTOIRE D'AMOUR	181	2 455,15	220
45	FEMMES EN MIROIRS	161	2 181,53	196
46	LES OUBLIES DE L'HISTOIRE	142	1 886,86	169
47	LE REGARD	126	2 268,00	203
TOTAL		681 341	18 748 865,70	1 727 919

Source: *Bilan Cinématographique Année - 2012*, Box Office des films marocains, CCM. * Box Office revenue in MAD is converted in EUR according to the rate of exchange set by Oanda currency converter on 31 December 2011.

Box Office of the first thirty films – 2012

	Title	Nationality	Admissions	Box office in MAD	Box office in EUR
1	ROAD TO KABOUL	MOROCCO	230 519	7 759 659.00	696.220
2	UN MAROCAIN A PARIS	MOROCCO	90 901	2 589 354.25	232.325
3	SKYFALL	USA	48 358	2 595 609.35	232.886
4	MISSION IMPOSSIBLE : PROTOCOLE FANTOME	USA	43 453	2 023 634.30	181.566
5	DIABETIQUE 3	MOROCCO	42 080	1 253 292.70	112.449
6	THE DARK KNIGHT RISES- BATMAN	USA/GB	41 487	1 755 555.00	157.514
7	ZERO	MOROCCO	39 795	1 265 235.00	113.521
8	TWILIGHT CHAPITRE 5 : REVELATION 2ème PARTIE	USA	37 499	2 122 820.00	190.466
9	X- LARGE	EGYPT	36 494	1 011 205.45	90.728
10	THE AMAZING SPIDER MAN	USA	36 049	1 056 422.12	94.785
11	ASTERIX ET OBELIX AU SERVICE DE SA MAJESTE	France	29 020	1 270 976.00	114.036
12	THE AVENGERS	USA	28 478	1 504 390.11	134.978
13	L'AMANTE DU RIF	MOROCCO	28 321	755 576.04	67.792
14	BLANCHE NEIGE	USA	27 718	920 272.67	82.569
15	MEN IN BLACK 3	USA	25 407	1 227 995.44	110.179
16	ANDALOUSIE MON AMOUR	MOROCCO	23 322	547 206.87	49.096
17	SEXY DANCE 4 MIAMI HEAT	USA	22 963	778 350.00	69.835
18	LA COLERE DES TITANS	USA	21 844	808 351.16	72.527
19	MAINS RUDES	MOROCCO	20 539	530 962.60	47.639
20	LES SEIGNEURS	FRANCE	20 356	1 004 130.00	90.093
21	AGADIR BOMBAY	MOROCCO	20 100	450 688.22	40.437
22	VOYAGE AU CENTRE DE LA TERRE 2: L'ILE MYSTERIEUSE	USA	19 001	803 625.48	72.103
23	SHERLOK HOLMES 2 : JEU D'OMBRES	USA	17 660	647 469.67	58.092
24	HUNGER GAMES	USA	17 617	651 188.91	58.426
25	FEMME ECRITE	MOROCCO	17 000	509 695.00	45.731
26	LE RETOUR DU FILS	MOROCCO	16 730	423 650.65	38.011
27	UN BONHEUR N'ARRIVE JAMAIS SEUL	FRANCE	16 699	613 900.00	55.08
28	JASON BOURNE : L'HERITAGE	USA	16 589	813 555.00	72.994
29	LA VERITE SI JE MENS III	FRANCE	16 267	660 791.78	59.288
30	UNDER THE SEA	USA	15 730	550 550.00	49.397
	TOTAL		1 067 996	38 906 112.77	3 490.763

Source: *Film Industry Assessment - 2012*, Box Office revenue of the first thirty films, CCM.

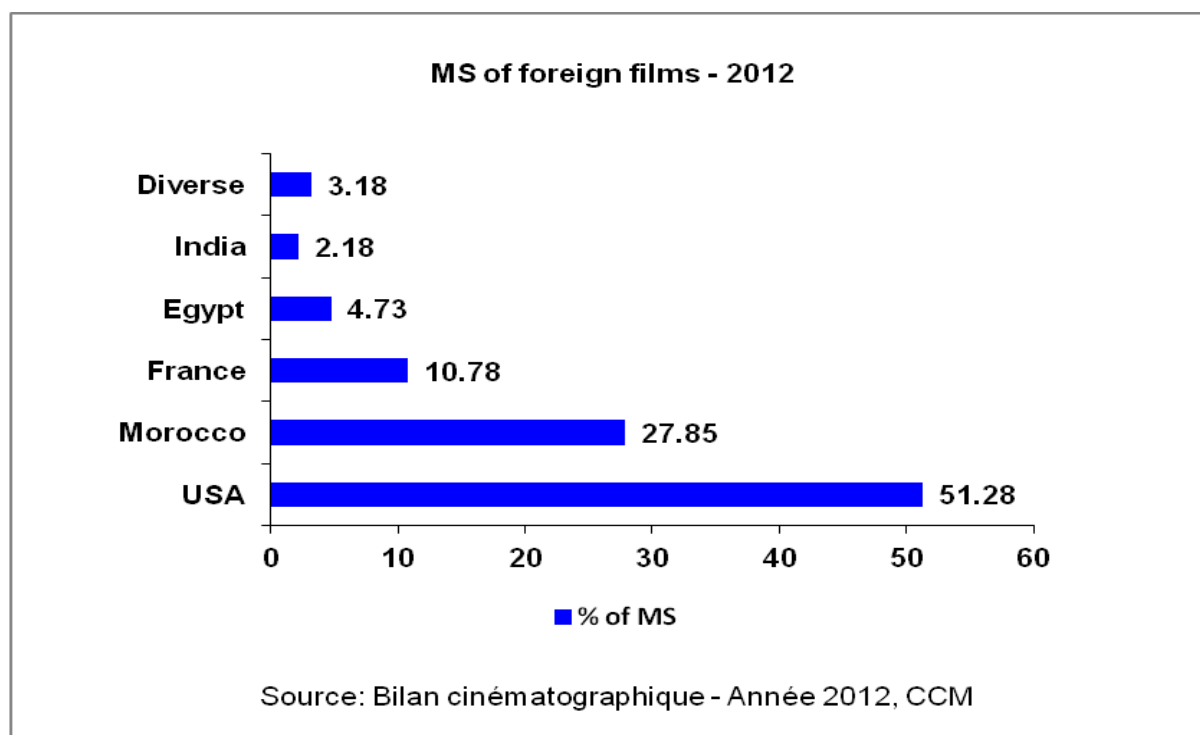
* Box Office revenue in EUR is converted according to the rate of exchange set by Oanda currency converter on 31 December 2012.

Box Office per nationality – 2012

Country of origin	Number of films	Admissions	% compared to total number	Box office in MAD	Box office in EUR	% compared to total number
USA	140	855 564	42.53	35 473 762.88	3 182 810	51.28
Morocco	47	681 341	33.88	19 258 560.70	1 727 940	27.85
France	27	152 532	7.58	7 461 290.58	669 449	10.78
Égypt	25	143 838	7.16	3 268 219.41	293 234	4.73
India	65	101 082	5.03	1 506 597.17	135 176	2.18
Others	68	76 937	3.82	2 204 251.46	197 772	3.18
TOTAL		2 011 294	100%	69 172 682.20	6 206 381	100%

Source: Film Industry Assessment - 2012, Box Office revenue by nationality, CCM.

* Box Office revenue in EUR is converted according to the rate of exchange set per Oanda currency converter on 31 December 2012.

**8.7. Distribution of Moroccan film abroad**

Moroccan professionals often complain of the difficulty for their films to reach European screens and of the very small shares Moroccan films obtain on this market. According to the LUMIERE database of the European Audiovisual Observatory, between 1996 and 2012, 74 Moroccan films or films with Moroccan participation were distributed in Europe. This includes 25 entirely Moroccan films and 14 films with coproduction. The other films are minority co productions with partner countries: mainly France (main co producer in 20 films).

Film and audiovisual data collection project

Admissions of Moroccan films in Europe (1996-2012)

Production																													
Film	Country of production	year	AT	BE	BG	CH	CZ	DE	DK	ES	FI	FR	GB	GR	HU	IE	IS	IT	LU	NL	NO	PL	PT	RO	RU	SE	SI	TR	Total U.E.
Indigènes	FR / MA / AL / BE	2006		76 927		26 709			4 162	35 301		2 995 992	41 888						3 077	3 917			3 388			7 960			3 172 612
La source des femmes	FR / BE / IT / MA	2011			300	6 683				43 114		638 824	10 324	2 229					46 345				6 050			8 369			755 555
Omar m'a tuer	FR / MA	2011		12 555								572 568														1 729			586 852
Yadon ilaheyya	FR / MA / DE / PS	2001	5 032	23 063		14 110	3 579	24 671	689	10 556	1 387	287 130	20 644	15 517	3 093	1 833	338	14 896	715	6 691	7 654		20 952			2 889	10	11 177	443 347
Zanan-e bedun-e mardan	DE / MA / FR	2009	7 529	3 298		13 023		46 210	4 261	12 962		22 758	7 281	2 654	3 068				62 533	7 791	6 448	5 761		1 248	1 240	13 163			200 517
Le grand voyage	FR / MA	2004	7 502	4 021	27	335		35 864		9 007		77 653	3 680			5 505			4 433		10 886	198					924	14 420	159 502
Ali Zaoua Prince de la rue	FR / BE / MA	2000	2 185	15 278				9 698		10 685	1 585	109 884	454						139	1 622	3 281					4 698			156 228
Moolaadé	SN / FR / BF / CM / MA / TN	2004	3 622	2 568		8 179		7 135		13 959	898	77 133	11 965					5 018		4 521	115					1 392			128 211
Marock	FR / MA	2005		8 507		549						107 981			4 816						320								121 624
Française	FR / MA	2008		1 013								101 871																	102 884
J'ai vu tuer Ben Barka	FR / MA / ES	2005		1 113						4 898		59 526	6 366																71 903
Raja	FR / MA	2003			37							66 397																	66 434
Whatever Lola Wants	MA / US / FR / CA	2007										52 093									403								52 093
Les yeux secs	FR / MA	2003										51 601																	51 601
Un Novio Para Yasmina	MA / ES	2008								46 749																			46 749
L' enfant endormi	BE / MA	2004			23	76		1 547				27 811								5 579		7 246							42 206
Smile	IT / MA	2009																	34 314										34 314
Sur la planche	MA / FR / DE	2011										31 906																	31 906
Mille mois	FR / BE / MA	2003		3 605		1 777			974			13 737	1 642						1 327	93	3 200					1 078			25 656
WWW: What a Wonderful World	FR / MA / DE	2006		716		2 560		4 717	949	3 764		7 509								3 673	2 041								21 328
Ten'ja	FR / MA	2004										25 890																	25 890
In het huis van mijn vader	NL / MA	1997										6 200								14 400									20 600
Casanegra	MA / IT	2008		42	21							7 548								6 274	4 066								13 885
Aoud rih	MA / FR	2002				4 706						11 103																	11 103
Number One	MA	2008										13 833																	13 833
Mektoub	FR / MA	1998										9 124								751	823								9 875
Les bandits	MA	2003										2 072								7 340									9 412
La vida perra de Juanita Narboni	MA / ES	2005								7 797																			7 797
Tangerine	DE / MA	2008	476					5 377																					5 853
Nissa... wa nissa	MA	1999										4 763																	4 763
Bye-Bye Sourty	MA	1998										4 680								45									4 725
Fantômes de Tanger	FR / MA	1998										4 260																	4 260
Où vas-tu Moshé?	MA / CA	2007										3 799																	3 799
Le Regard	NO / MA	2005																			3 404								0
Al Malaika la tuhaqiq fi al-dar albayda	IT / MA	2004											809						2 323										3 132
Café de la plage	FR / MA	2001										2 565																	2 565

Film and audiovisual data collection project

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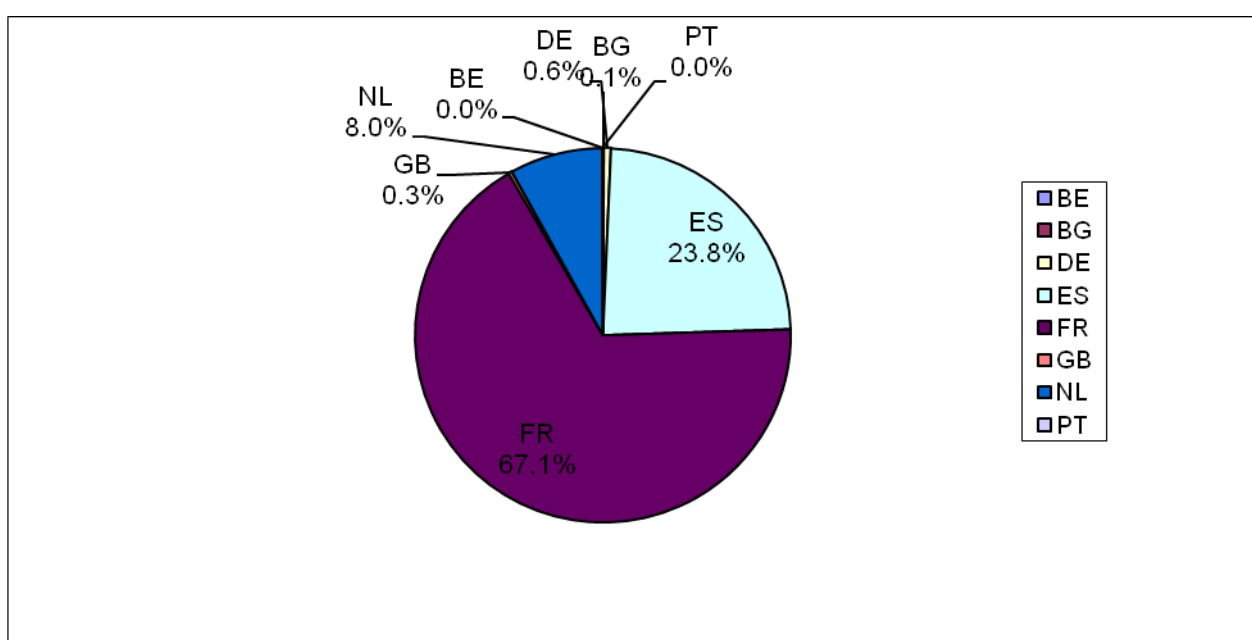
Source : European Audiovisual Observatory/ LUMIERE data base

These 74 films made a total of 6.4 millions admissions but it must be admitted that the largest share of these admissions is recorded by films with minority Moroccan contribution. If we leave aside films with minority Moroccan contribution, the 39 films of Moroccan initiative account for slightly over 208,000 admissions in the EU throughout the period ; in other words an average of 7,201 admissions per film.

Over the considered period, the market share of Moroccan films (100% or majority coproduction) distributed in the European Union is then quite small: less than 0%. According to the data of the European Audiovisual Observatory, non-European and non-American films together account for a market share estimated between 1% and 2% in the EU¹.

France is by far the main country of opportunity for Moroccan cinema: it accounts for 67.1 % admissions, while Spain accounts for 23.8 % and the Netherlands 8 %.

Distribution of admissions for films of Moroccan initiative in the EU (1996-2012)



Source: European Audiovisual Observatory / LUMIERE Data base

It shows that the European market is extremely closed for Moroccan and Arab films in general; may be more so than the extent to which the Moroccan and Arab market is closed to European cinema. (See chart on market shares of European and foreign films in the total number of screenings in Morocco – 2011)

The reasons behind this resistance are of course multiple. The dominance of the European market by either domestic cinema or American films and the virtual absence of a real Moroccan distribution structure in Europe limit the chances of a meaningful presence of Moroccan cinema in Europe. The reasons explaining the poor circulation of Moroccan films in Europe do not apply when it comes to the circulation of European films which take a good share of the Moroccan market (France 1.49%; Great Britain 1.13%), and also of films of Indian origin 3.91% and other

¹ The LUMIERE database of the European Audiovisual Observatory (<http://lumiere.obs.coe.int>) regularly compiles available data on admissions to films distributed in European cinemas since 1996. The resulting data are the fruit of collaboration of the European Audiovisual Observatory with specialized domestic sources and with MEDIA program of the European Union. Coverage for the European Union is around 90 %. However, for less popular films, there are gaps in the database due to the fact that some countries do not provide full lists of all distributed films.

films of various origins 11.68%. Add to this the fact that all these “other” film industries are automatically in strong competition with American cinema which ranks first on the local market with 46.83%, with Moroccan domestic production holding 18.25% and with Egyptian cinema ranking third with a rate of 12.78%.

There are few data on Moroccan cinema in other parts of the world.

8.8. The physical video market

Concerning DVD distribution, Morocco is in Area 5 which also includes Russia, India, Africa and North Korea¹.

The video market is poorly documented. Various editors from Morocco or other Arab countries (especially the Saudi group Rotana) publish domestic films. American studios distribute their films in original language. Sale points are mainly the specialized retailers (Virgin Megastore...).

Legal supply is however faced with the pirate market. Although the International Intellectual Property Alliance (IIPA) placed Morocco in 2006 in its section *Special Mention* stressing that Morocco had just enacted “one of the most modern copyright laws in the world, including key protections for the digital age, and enforcement mechanisms to account for the changing nature of commercial copyright piracy”², physical DVD piracy is still a major issue in retail stores and street stalls. It is a serious issue in most Moroccan cities and hampers market development.

8.9. Recent VoD beginnings and online piracy

Although online consumption of films and television series, in Morocco as in the rest of the world, is dominated by piracy, there are attempts to launch legal offers aimed at the whole Arab speaking market. Saudi Arabia and Gulf States seem to be the main markets in the starting phase. The website shofha.com, operated by LINKonLINE from Egypt, a subsidiary of LINKdotNET (a company of Orascom Telecom Holding), is available on internet in Morocco and gives access to a catalogue of Arab films.³ We have no data on the reputation of this service or of its success.

We are not aware of websites established in Morocco making legal VoD offers. It is however not difficult to identify free internet offers in streaming (so which, in all likelihood, are not allowed).⁴

¹ Industrialists designed a system of zones mainly to limit disc exports outside designated regions to allow editors to keep individual control on sale prices and on release date in each part of the globe.

² *Additional Appendix (Web only)- 2012 Special 301 Report on Copyright Protection and Enforcement*, IIPA, <http://www.iipa.com/pdf/2012SPEC301HISTORICALSUMMARY.pdf>. It should be noted that in 2007, IIPA included Morocco in its section “Dispute Settlement” highlighting the challenges facing Morocco in the light of the free trade agreement between the United States and Morocco/ U.S.- Morocco Free Trade Agreement.

³ See S.A.LI, *Projet de collecte de données statistiques sur les marchés cinématographiques et audiovisuels dans 9 pays méditerranéens. Premier rapport intermédiaire Monographies nationales : ÉGYPTÉ*, (Project of statistical data collection on film and audiovisual markets in 9 Mediterranean countries. First intermediate report; National monographs: EGYPT) Euromed Audiovisual / European Audiovisual Observatory, 2012, p.66 <http://www.euromedaudiovisuel.net/Files/2012/09/17/1347873169237.pdf>

⁴ The website Aflamedia.com proposes 126 Moroccan films in free access. http://www.aflamedia.com/movies/films_marocains.htm

A few Moroccan films (or in minority Moroccan coproduction) are accessible on French websites devoted to art cinema, especially Universciné website.¹

8.10. National film events

For around ten years now, the Moroccan art scene had the benefit of a boom of festivals. Their development has been highly profitable to both film professionals and the public. The liveliness of the sector reflects the commitment of public authorities and of CMM which devotes an annual amount of 23 MAD² in other words 2 MEUR and shows a general awareness of the need for festivals.

In 2010, 52 national film events took place in Morocco. 2011 had 46.

In fact, there are nowadays three types of festivals on the Moroccan film scene. The first is the category of international festivals perfectly embodied in the International Film Festival of Marrakech (FIFM). It celebrated its 13th anniversary in 2012 and is organized by the Foundation of the International Film Festival of Marrakech headed by His Royal Highness Prince Moulay Rachid.

The second category includes national and regional festivals like the National Film Festival which takes place in Tangiers and which organized its 13th edition in 2012.

Finally, theme-based festivals are embodied in Salé festival on women, Agadir festival on cinema and migration, and Rabat festival devoted to art cinema. The 2012 schedule of Moroccan film events includes 52 national film events organized by Moroccan associations throughout the Kingdom as mentioned below:

¹ <http://www.universcine.com/films/pays/maroc>

² Jaouad Mdidech, *36 festivals du cinéma au Maroc*, pour quoi faire ? (36 film festivals in Morocco What for ?), in *La Vie éco*, 25 April 2008, <http://www.lavieeco.com/news/culture/36-festivals-de-cinema-au-maroc-pour-quoi-faire--6900.html>

Festivals and film events in Morocco

	Festivals – Events – Days and weeks	Venue	Edition	Period
1	National Film Festival	Tangiers	13	12 - 21 January
2	Festival of " Cinema and Migration"	Agadir	9	8 - 11 February
3	International Film Festival for Children	Tangiers	19	19 fév.- 27 May
4	Maghreb-Asian Festival of short Films	Tissa-Taounat	5	23 - 26 February
5	National Short Film Festival	Oujda	1	1 - 3 March
6	International Short Film Festival	Tiznit	2	2 - 4 March
7	Moroccan Film Festival	Fès	17	7 - 10 March
8	Highlands Festival of Amazigh Film	Azrou - Ifrane	2	8 - 9 March
9	International Festival of Film Schools	Ouarzazate	3	8 - 10 March
10	University Film Festival	Er-Rachidia	7	14- 18 March
11	Science Film Festival	Marrakech	7	20 - 24 March
12	Nachia Film Festival	Tangiers	5	21 - 25 March
13	International Mediterranean Film Festival	Tétouan	18	24 - 31 March
14	HandiFilm Festival (Cinema and disability)	Rabat	6	28 - 31 March
15	Cinebassamat Festival	Rabat	4	6 - 9 April
16	National Festival of Amateur Cinema	Settat	6	10 - 14 April
17	International Festival of Documentary films	Zagora	1	13 - 15 April
18	National Cinema and Culture Festival	Tangiers	5	15 - 22 April
19	International Documentary Festival (FIDA DOC)	Agadir	4	24 - 28 April
20	Moroccan Film Festival	Sidi Kacem	13	26 - 30 April
21	Festival of Cinema and Youth	Had Kourt	5	27 - 29 April
22	International Festival of Documentary Films	Fès	6	28 April - 4 May
23	International Festival of Animation cinema in Meknès (FICAM)	Meknès - Oujda Kenitra - Rabat Casablanca El Jadida - Tangiers Tétouan - Safi Marrakech Agadir	12	2 May - 13 June
24	Film Khayma	El Aounate Sidi Bennour	4	3 - 5 May
25	Maghreb Festival of Documentary Films	Oujda	1	3 - 5 May
26	International Wildlife and Environment Film Festival	Rabat	8	3 - 6 May
27	International Student Film Festival	Casablanca	5	9 - 12 May
28	"Cinema and Literature" Festival	Mechraa Belksiri	6	10 - 13 May
29	National Educational Film Festival	Fès	11	11 - 13 May
30	Short Film Festival in Sebou	Kenitra	6	16 - 19 May
31	National Festival of Amateur Short Films	Chefchaouen	4	16 - 19 May
32	International Film Festival of Doukkala	El Jadida	2	24 – 27 May
33	<i>Ciné Maroco – Espagnol</i> Festival	Martil	12	27 May - 2 June
34	International Festival of Short Films and Documentaries	Casablanca	7	15 - 19 June
35	International Film Festival on Human Rights	Rabat	5	18 - 20 June
36	Film Festival " Shared Memory"	Nador	1	19 - 21 June

37	International Festival of Independent Art Cinema	Rabat	18	22 - 30 June
38	African Film Festival	Khouribga	15	30 June - 7 July
39	Film Festival	Guelmim	3	1 - 4 July
40	International Festival of young people's cinema	Meknès	2	3 - 5 July
41	Festival of Cinema and Education	Rabat	7	13 - 16 July
42	Arab World Festival for Short Films	Azrou / Ifrane	14	23 - 26 Aug
43	International Festival of Documentary Films	Khouribga	4	29 Aug – 1 st Sept.
44	International Women's Film Festival	Salé	6	17 - 22 Sept.
45	International Amazigh Film Festival Issni N Ourgh	Agadir	6	26 - 30 Sept.
46	Mediterranean Short Film Festival	Tangiers	10	1 - 6 Oct.
47	Peoples Film Festival	Imouzzar / Kandar	9	1 - 4 Nov.
48	International Transsaharan Film Festival	Zagora	9	8 - 11 Nov.
49	Moroccan Short Film Festival	Rabat	3	13 - 18 Nov.
50	Cinema for All Festival	Tiznit	5	21 - 25 Nov.
51	International Film Festival in Marrakech	Marrakech	12	30 Nov. - 8 Dec.
52	Film Festival of Kalaat Sraghna	Kalaat Sraghna	2	13 - 16 Dec.

Source: *Film Industry Assessment- 2012*, CCM.

8.10.1. Events organized with CCM

Dedicated to cultural exchange among film industries of the world, the Moroccan Cinematographic Center organized several events in 2012, especially to promote other foreign cinemas:

N°	Event	Dates	Screening venues
1	Serbian Film Week in Morocco	06 to 11 February	7ème Art cinema
2	Italian Film Week in Morocco	Tues 24 January Tues 18 February Tues 2 February Tues 13 March Tues 27 March Tues 10 April Tues 24 April	7ème Art cinema
3	Portuguese Film Week in Morocco	15 to 20 April	7ème Art cinema
4	Festival International de Films d'Ecoles (Festimaj)	28 May to 08 June	7ème Art cinema
5	Polish Film Week in Morocco	1st to 7 June	Villa des arts in Rabat
6	British Film Week in Morocco	11 to 24 November	7ème Art Cinema Sidi Taibi Nomad Theater Tangiers Cinematheque
7	European Film Week in Morocco	19 to 26 November	Théâtre Mohammed V
8	German Film Week in Morocco	05 to 10 December	7ème Art cinema
9	Italian Film Week at « Cinéitalia in Morocco »	11 to 14 December	7ème Art cinema
10	German Film Week in Morocco	12 to 16 December	Tangiers Cinematheque

Source: *Film Industry Assessment - 2012*, CCM.

8.11. Participation of Moroccan cinema at international festivals

From 1st January to 31st December 2011, Moroccan cinema took part in 131 international film events (festivals, meetings and cultural weeks)¹.

In 2010, 20 Moroccan films were awarded at international festivals. In 2011, Moroccan films at international festivals around the globe obtained 47 awards

The presence of Moroccan cinema was further reinforced during 2012 with active participation at 145 international film events. From 1st January to 31st December 2012 Moroccan cinema received 65 international awards².

8.12. A new reform movement

As we have explained, domestic production benefits from support and develops in favor of a new wave of filmmakers and actors who are giving a new impetus to Moroccan cinema.

Yet, despite the dominant role of the state in developing the domestic film industry, Moroccan cinema is caught in a sort of paradox: increase of the number of films produced (many of which gained international recognition), and sharp and consistent decline of the number of cinemas. Piracy, combined with audience disinterest, contribute to enhancing the problem: an increasing production versus a distribution and operating sector in difficulty. Dominant State funding faces a near absence of the private sector.

Through CMM, the State is a de facto producer of almost all Moroccan films. It is also co producer via the two public channels. Since 2006, the State made its participation in TV fiction production and/or coproduction a requirement in the specifications of the two main television channels, either by buying broadcasting rights for a few films or in investing in production.

TV Coproduction contributes to solving problems of profitability, of promotion and to some extent of distribution. The "Film Industry" project is an example. Between 2006 and 2007, around 30 TV fictions were produced by Ali N'Production in less than two years with SNRT contribution of 19 MMAD (1.6 MEUR) over a total budget of 36 MMAD³ (3.1 MEUR).

To conclude on this film market analysis, the following table is a useful summary highlighting the gaps and challenges of the Moroccan film market, with its strengths and weaknesses.

¹ *Film Industry Assessment- 2011*, CCM. On preceding years, see also C. FRANCE, *La diversité culturelle au sein des festivals internationaux. Etude de cas du cinéma marocain*. Master's dissertation in communication, Laval University, Montreal, September 2008.

² *Film Industry Assessment- 2012*, CCM ; <http://www.ccm.ma/inter/phactualite/bilanfr2013.pdf>

³ *Diagnostic de l'Économie du Patrimoine Culturel au Maroc, sa situation présente et les possibilités d'exploitation et de promotion des ressources qu'il recèle*, Ministry of Culture- MDG Achievement Fund, October 2010, p.110. See : http://www.minculture.gov.ma/fr/images/stories/pdf/Diagnostic_economie.pdf

Strengths	Weaknesses
Increasing production	Gradual closing of cinemas
Creativity impetus in the film sector	Absence of private production
How popular Moroccan cinema is among Moroccan public	Lack of training
Opportunities	Risks and threats
Festival activity	Piracy
State investment	Weakness of the Distribution / Operating links in the chain
Involvement of public television	Unsufficient promotion
Coproduction and exchange agreements with many countries	Development of foreign film production industry at the expense of domestic production

*However, the absence of private investment in the sector is one of the major weaknesses of the domestic market. As long as private individuals are not interested in investing there, the Moroccan film market will remain small. "The market is what makes domestic production. Yet the private sector does not identify its market; no one invests in cinema. There should be a real market and real sale on the international scene. Morocco is a small market and cinema is costly; it scares investors who earn little in return. As long as culture is not regarded as a market likely to generate income, managers will not be interested"*¹.

8.12.1. Cinema Conference - October 2012²

The national *Cinema Conference*, held from 16 to 18 October 2012 in Rabat, under the High patronage of HM King Mohammed VI and organized by the Ministry of Communication with the Moroccan Cinematographic Center (CCM) and the institutions of the sector, gathered over 300 participants, including institutional stakeholders, professionals and Moroccan and foreign specialists of the sector. It was the first time such a conference in the field takes place in Morocco and was intended as an open forum of exchange on the strengths and weaknesses of the Moroccan film industry and on the means to benefit from achievements to give a new impetus to the sector and enhance its competitiveness.

The planned workshops will be an opportunity for a deeper discussion of the existing challenges along all the production and distribution cycles and for an attempt to meet the sector's challenges of regulation, arts and business to be encountered in the country. The main objective was to provide concrete answers to the concerns of professionals and to help implementing an integrated national strategy to promote film production in both form and content.

The first workshop on "national production and technological change" examined the current situation and the prospects of film production, as well as the means to promote partnership between cinema and television in order to meet the challenges of technological change.

¹ Statement by Belyazid Farida quoted in *Diagnostic de l'Économie du Patrimoine Culturel au Maroc*, Ibid, p. 115.

² According to a press release of the Ministry of communication, October 2012, <http://www.mincom.gov.ma/fr/actualites/item/661-ouverture-a-rabat-des-assises-nationales-sur-le-cinema.html>

According to the concept note of this workshop, in order to succeed it is important to diversify the sources of funding, to establish a 10 million MAD annual increase of State subsidies to film industry, to provide the sector with a specific programme contract and to promote Moroccan films inside and outside the country.

In the second workshop, on infrastructure, distribution, operating and investment, the emphasis was on the need for public authorities to act urgently and efficiently to develop a solid infrastructure (movie theatres, multi-cinema units...) to strengthen Moroccan film competitiveness and open access to screening halls in all parts of the country.

Participants at the third and fourth workshops on “technical professions and para-film business”, and “training and qualification”, developed a charter defining the rights and obligations of film technicians and implemented targeted training programmes for professionals, in partnership with specialized national and international institutions.

The fifth workshop thoroughly examined the relationships between cinema and audiovisual media highlighting their complementary nature and their need to join their resources; while the sixth workshop dealt with the ways to enhance the impact of domestic film festivals, mainly by setting an annual agenda of film events, all types included, and by supporting film clubs.

Intellectual property rights, copyright and the fight against piracy are however on the agenda of the seventh workshop which will be an opportunity to promote partnership between the Ministries of the Interior and of Communication, the Moroccan Film centre (CMM), the Moroccan Office for industrial and commercial property and the Moroccan anti piracy association. It is to be noted that on 1st October 2011, Morocco signed with nine other countries (Australia, Canada, the United States, Japan, Korea, Mexico, New Zealand, Singapore and Switzerland) and the European Union¹, the anti-counterfeiting trade agreement (ACTA)² which was later rejected by the European Parliament on 4th July 2012. According to the signing parties, the aim of ACTA was to establish international standards to enforce intellectual property rights so that the fight against the growing issue of counterfeiting and piracy becomes more efficient. The agreement focuses on three areas: improve international cooperation, establish more effective enforcement practices and provide an efficient legal framework open for signing since May 2011.

The eighth workshop, on regulations and the organization of the sector, focuses on ways to reorganize Moroccan film industry so that it gains in abundance, quality and diversity, as Morocco should at international events, and reflects the positive activity marking Morocco's cultural and artistic landscape.

On behalf of the Government, the Minister of Communication, Mustapha Khalfi, presented on 22nd October 2012 in Rabat, the conclusions (over 200 recommendations) of the national film conference³.

¹ “Joint Press Statement of the Anti-Counterfeiting Trade Agreement Negotiating Parties”, <http://www.ustr.gov/about-us/press-office/press-releases/2011/october/joint-press-statement-anti-counterfeiting-trade-ag>

² http://trade.ec.europa.eu/doclib/docs/2011/may/tradoc_147938.pdf

³ From « M. Khalfi présente les conclusions des assises nationales du cinéma et les chantiers en cours dans les secteurs de l'information et de la communication » (Mr. Khalfi presents the conclusions of the national film conference and describes ongoing works in the information and communication sectors), Ministry of Communication website, 24 October 2012

<http://www.mincom.gov.ma/fr/a-la-une/item/690-m-khalfi-presente-les-conclusions-des-assises-nationales-du-cinema-et-les-chantiers-en-cours-dans-les-secteurs-de-linformation-et-de-la-communication.html>

The scientific committee of the conference, chaired by the scholar Abdellah Saâf, held its first meeting where a working methodology was laid out consisting in holding public meetings to discuss general issues related to the recommendations of the conference. The committee consisted of 24 representative members of various institutions and professions appointed in accordance with the diversity of cultural aspects and trends.¹

Mr. Khalfi noted that the film conference was a space for dialogue among professionals with the aim of implementing a road map likely to promote Moroccan cinema on the basis of the royal address to participants. On this occasion, he presented the regulations governing grant allocation to films, to digitizing and modernizing cinemas and to organizing festivals.

Mr. Khalfi noted that the first major activity relates to reforming the sector by following a new approach highlighted in the Audit Office report, through the achievements of the Moroccan Film Centre, international experience in the field of grants, training offered by the Higher audiovisual institute, which is being finalized, and the rehabilitation of the sector in a White Paper to be prepared by the scientific committee of the conference.

Finally, the Minister of Communication announced that the financial support of the State will be substantially increased from 2013 in order to maintain Morocco's leading status in the region.²

8.12.2. Cinema in 2013 Finance Law

The concept note of the Finance Law 2013, adopted on 15th October 2012, includes the following paragraph on cinema : « *As far as the film industry, 2013 will be mainly marked by the continued implementation of the new system of support to film production which privileges quality, by promoting film activity in Ouarzazate, by renovating existing cinemas and turning them into multi-cinema units, by enhancing support to cinema owners for digital equipment, by implementing a White Paper on production, and by reinforcing mechanisms to protect intellectual property rights and fight counterfeiting and piracy.* »³

8.12.3. Creation of two new committees⁴

On 15th January 2013, CCM established two new independent committees: the first will oversee the renovation and digitization of cinemas, while the second will be in charge of festivals and film events.

¹ « Stratégie de promotion du septième art : Installation de la commission chargée d'élaborer un Livre blanc », Libération, 5 October 2012. http://www.libe.ma/Strategie-de-promotion-du-septieme-art-Installation-de-la-commission-chargee-d-elaborer-un-Livre-blanc_a31245.html

² AFP report, quoted in RFI website, 17 October 2012. <http://www.rfi.fr/culture/20121017-assises-nationales-cinema-maroc>

³ http://www.lavieeco.com/documents_officiels/Note%20de%20presentation%20projet%20loi%20finances%202013%20-Maroc.pdf

⁴ « Installation de deux commissions dédiées à la gestion des festivals et des salles de cinéma au Maroc », <http://www.mincom.gov.ma/fr/a-la-une/item/828-installation-de-deux-commissions-d%C3%A9di%C3%A9es-%C3%A0-la-gestion-des-festivals-et-des-salles-de-cin%C3%A9ma-au-maroc.html> ; See also : M. BAKHRIM, "De nouvelles dispositions pour les festivals et les salles de cinéma au Maroc", Euromed Audiovisual website, 11 January 2013, <http://euromedaudiovisuel.net/p.aspx?t=news&mid=21&cid=16&l=fr&did=1171>

The committee for renovating and digitizing cinemas

The committee in charge of cinemas was entrusted to Rachid Andaloussi as Chair. He is an internationally renowned architect who achieved architectural works. He is also known for his commitment to the preservation of urban heritage in Casablanca.

This committee will be in charge of examining and supporting funding applications by cinemas to renovate and digitize. A support fund was established for this purpose. The amount of each grant may reach 100,000 Euros. Funding is granted on the basis of specifications involving the owner of the facilities and the supervisory authority.

“It is high time we helped some cinema owners who can no longer receive any film for lack of technical feasibility”, stated Mr. Andaloussi, adding that the first task consists in making a real technical assessment of the 54 facilities still operating in Morocco.

On 11 February 2013, the support Committee for digitizing, modernizing and building CCM facilities¹ announced the opening of applications to support digitization. Funding is granted to all regional and national cinemas on the basis of a request in accordance with the specifications laid out by CCM.

¹ News release on CCM website,
[javascript:PopupCentrer\('news.asp?code=963',640,540,'menubar=no,scrollbars=yes,statusbar=no'\)](javascript:PopupCentrer('news.asp?code=963',640,540,'menubar=no,scrollbars=yes,statusbar=no'))

8.12.4 Support to festivals

Festivals have also experienced much growth in the past few years. A new committee of nine members chaired by the academic and man of culture Hassan Esmili now controls the sector with the assistance of institutional representatives (finance, communication, culture, and CMM) and representatives of the film industry, the arts, culture and media.

Vibrant activity surrounds film festivals nowadays in Morocco. Around fifty events with various scopes and ambitions are organized every year in the Kingdom. They range from a major event like the Marrakech Festival with a present international status, to local well established events, often in city outskirts, far from the large urban centres. All these events were subject to various forms of public support through CCM.

Now, a committee will be responsible of following up on this support with specifications and a number of procedures to follow. The first major novelty to disrupt the old approach to festivals is the introduction of a ranking system by category, A, B, and C. 'A' festivals may receive grants of up to 1,200,000 Euros. Ranking is achieved according to a set of criteria concerning content as well as the scope of the event (local, regional or international).



9. THE MOROCCAN COPYRIGHT BUREAU (BMDA)¹

The Moroccan Copyright Bureau based in Rabat is a multi-disciplinary institution of collective management. It is established as civil society working under the Ministry of Communication.

Amendments to the Law No. 2-00 of 15th February 2000 were established and enacted in 2006² to enable the Kingdom to fully meet its commitments in a context of new national and international requirements and of challenges deriving from technological change.

BMDA has exclusive control of representation, perception and distribution of rights. It has the right to go to court to protect interests which members and mandates have entrusted to it. It is in charge of the interests of foreign authors' societies within the territory of the Kingdom.

Besides, the programme-contract signed on 3rd May 2010 between the Minister of Communication and BMDA and covering the period 2010-2012 had three goals to achieve³ :

- Upgrading the Moroccan Copyright Bureau
- Improving resources in favour of beneficiaries
- Fighting counterfeiting and piracy and promoting art

Within the limits of its powers, the Ministry of Communication undertakes to grant financial support to BMDA in achieving its development plan through a budget of 13 million MAD (in other words 1.158.610 million EUR) divided in three instalments as follows⁴ :

- 3, 000,000 MAD in 2010
- 4, 500,000 MAD in 2011
- 5, 500,000 MAD in 2012

It is to be noted that despite the legal foundations of BMDA, a growing controversy has been lately surrounding its activity. Since February 2012, hundreds of various categories of artists accuse BMDA of not paying royalties to artists.

¹ <http://www.bmdav.org>

² The law on copyright and related rights is of the year 2000 (Dahir No. 1-00-20 of 9 kaada 1420 (15 February 2000)) and was amended in 2006 (Dahir No. 1-05-192 of 15 moharrem 1427 (14 February 2006)). Morocco is party to the Berne convention (Paris Act, 1971), WIPO Convention, Brussels Convention and to the TRIPS agreement (Trade Related Aspects of Intellectual Property Rights) of the World Trade Organization (WTO) ; <http://www.mincom.gov.ma>

³ Ministry of communication, *Contrat Programme pour la mise à niveau du Bureau Marocain du Droit d'Auteur*, 03 May 2010, Rabat. (Document received during our data collection mission at the Moroccan Ministry of Communication).

⁴ Ibid.

In fact, many Moroccan artists do not receive their copyright fees although their works are broadcast on Moroccan audiovisual media and in some cases abroad. Moroccan artists are currently claiming the protection of their works and payment of their copyright and related rights.

Following the petition to audit BMDA¹ with 656 signatures, the Association of Moroccan present musical forms, the Association Racine, EAC-L'Boulevard and Bassata Productions organized a roundtable with main stakeholders of culture to discuss the issue: artists, authors, composers and performers were present to express their outrage at the severe lack of legislation on copyright in Morocco. Protesters highlighted the vagueness surrounding copyright management, the endless waiting after an application for intellectual property is duly submitted to BMDA and the meaningless fees some artists have received while others have received nothing. For these major players in the field of culture, Moroccan arts are at risk.²

In the same context, following the petition, an audit of BMDA started, allowing all the indignant to have an impartial, objective and accurate assessment of the situation of copyright in Morocco (legal, structural and financial audit)³. To date, only three radio stations, including Hit Radio and two television channels, SNRT and 2M are paying copyright fees.

BMDA executives replied to criticism by stating that 2000 artists in Morocco actually receive their copyright fees. According to statements by BMDA executive director, Abdallah Ouadghiri⁴, the fees amount to 140 million MAD per year. 13 million MAD are for restructuring the organization. A partnership agreement was concluded between BMDA, Médi1 and Maroc Cultures. "We have succeeded to have the approval of Medi1 executives and Maroc Cultures association for payment of outstanding copyright" says BMDA director general. He also states that the only broadcasters who pay copyright fees to the institution are SNRT, 2M, Atlantic radio and Hit radio. He states that the amount of payments is 1.2 MMAD shared between the authors registered at BMDA in four installments⁵.

Moroccan cultural stakeholders are unsatisfied and not convinced with BMDA many arguments to defend itself against the harsh accusations in its regard and pursue their action to fulfill their rights.

9.1. Monitoring and governance committee on copyright and related rights⁶

The induction ceremony of the committee members for monitoring and governance of the copyright and related rights sector under the Ministry of Communication took place on Friday 4th January 2013, in Rabat.

¹ The Petition, For an audit of BMDA ; www.10888.lapetition.be

² Afaf Sakhi, BMDA, *Droits d'Auteurs : le combat continue*, Le Matin, 01 June 2012 ; <http://www.lematin.ma>

³ Mehdi Halib, BMDA Audit : "Depuis quand un audit est il une menace ?", 22 February 2012, <http://www.aufaitmaroc.com/actualites/culture/2012/2/22/mehdi-halib-compositeur-depuis-quand-un-audit-est-il-une-menace->

⁴ See Fatima-Ezzahra Saâdane, « Droits d'auteurs, le BMDA tente de se justifier », Les Echos, 07 June 2012 ; http://lesechos.ma/index.php?option=com_content&view=article&id=23173:droits-dauteurs-le-bmda-tente-de-se-justifier&catid=12:culture

⁵ Ibid. On the other hand, on 25 December 2012, BMDA website is inaccessible for lack of updating.

⁶ Members of the monitoring and governance committee in the field of copyright and related rights are inducted, (MAP) ,04 January 2013, <http://www.mincom.gov.ma/fr/a-la-une/item/821-installation-des-membres-du-comit%C3%A9-de-suivi-et-de-gouvernance-dans-le-domaine-du-droit-dauteur-et-droits-voisins.html>

During the ceremony, the minister of Communication, Mustapha Khalfi, speaking on behalf of the government, indicated that the creation of this committee is part of a comprehensive programme to promote the Moroccan Copyright Bureau (BMDA) as an advanced and integrated reform tool for compliance with the values of transparency and governance, the fight against piracy and the consecration of copyright and related rights¹.

The new framework will focus on questions related to promoting and protecting national heritage as a strategic choice through a number of projects to protect creative works of art, preserve copyright, integrate youth in various artistic areas and extend BMDA range of membership.

He added that this project is in the wake of undertakings to implement the provisions of the Constitution on freedom of thought, opinion, expression and publication in the fields of literary and artistic performance, and of scientific and technical research.

Mr. Khalfi explained that the undertaking reflects the trend followed by the State program in this field and achieves Morocco's international commitments in the field, adding that the project will help achieve an institutional upgrading especially through renewing the programme-contract with BMDA, developing human resources, organizing awareness raising campaigns and enhancing membership².

¹ Ibid.

² Ibidem.

10. TRAINING OF AUDIOVISUAL PROFESSIONALS

Given the state of creative film and audiovisual industries in Morocco, academic training is carried out in the Kingdom and covers all the needs of the sector.

List of higher schools and institutes of audiovisual training

- **(ESAV)** École Supérieure des Arts Visuels de Marrakech (Marrakech school of visual arts)
- **(STUDIO M)** École Supérieure des Arts et Média de l'Image et du Son (School of arts, and of sound and image media)
- **(INISMA)** Institut International Spécialisé en Multimédia et Audiovisuel (Specialized multimedia and audiovisual international institute)
- **(ISCA)** Institut Spécialisé du Cinéma et de l'Audiovisuel (Specialized film and audiovisual institute)
- **(IHB)** Institut Halima Borkadi (Halima Borkadi Institute) /Casablanca
- **(ESIMAV)** École Supérieure d'Informatique, Management et audiovisuel (School of computer science, management and audiovisual communication)/ Casablanca
- **(BIG SOFT)** Institut privé d'enseignement professionnel (Private institute of professional training)/Rabat
- **(EMCC)** École des métiers du Cinéma de Casablanca (Casablanca school of film professions)
- **(IJMT)** Institut de Journalisme et Métiers de la Télévision (Institute of journalism and television professions)/Casablanca
- **(IFJ)** Institut d'Information et de Formation Journalistique (Institute of information and journalism education) /Casablanca
- **(GEI)** Groupe des Écoles Internationales (Group of international schools)/Casablanca
- **(Mondial Media)** École Internationale des Métiers de l'Audiovisuel et du Journalisme (International school of audiovisual and journalism professions)/Casablanca
- **(ISIC/OFPPPT)** Institut Spécialisé Industriel Casablanca (Casablanca industrial institute)
- **(ISMIC/OFPPPT)** Institut Spécialisé dans les Métiers du Cinéma, (Institute of film professions), Ouarzazate
- Faculté des Lettres et des sciences Humaines de Ben M'sik (Ben M'sik faculty of arts and human sciences)/Casablanca
- Faculté Polydisciplinaire d'Ouarzazate (Ouarzazate multidisciplinary faculty)
- Faculté des Lettres et des Sciences Humaines de Marrakech (Marrakech faculty of arts and human sciences)

It is to be noted that despite this list of academic training institutions, the sector requires multiple aspects of practical training to meet the needs of the different levels of film industry in Morocco.

In this context and in order to address the shortage of practitioners, some operators play an important role filling the gaps in training and basic learning for the development of the film market. We mention the following:

- Office of vocational training and promotion of labor (OFPPPT)

Because it is aware that the use of information technologies is an essential factor for the advent of knowledge-based society, OFPPT dedicates ten institutions of vocational training EFP to training in the ICT sector.

The sector includes 4 certificate-awarding channels of Skilled Technician (ST) and Technician levels: IT development techniques (ST); multimedia development techniques (ST); Techniques of computer networks (ST); Maintenance and computer systems and networks (T).

- Higher Institute of audiovisual and film professions (ISMAC)

The Higher Institute of audiovisual and film professions is based in Rabat. It is a public institution of higher education specialized in audiovisual and film professions.

As an ambitious public institution with a 200-student capacity, ISMAC provides an initial training in six branches ending with a professional Bachelor's degree followed by a Master's degree in sound engineering and image engineering organized jointly with the Agence Nationale de Réglementation des Télécommunications, ANRT (the National agency for telecommunication regulation).

- Film and audiovisual specialized institute (ISCA)

The film and audiovisual specialized institute (ISCA) is a private institute of learning, specialized in film and audiovisual professions¹.

ISCA was founded in 2002 by academics and media professionals. The institute is accredited by the ministry of vocational training since April 2007.

Since its creation, ISCA's goals have consisted in promoting the Moroccan audiovisual landscape with capacity building and human resource development in training a new generation of professionals and image and sound specialists.

¹ <http://www.isca.ac.ma>

**Annex. List of officials and people interviewed in Morocco
June 2012**

1. Mr. Abdel Majd Rechiche, Filmmaker and Director, member of Authors, Directors and Producers' grouping, (GARP)
2. Mr. Abdelouahad Belghiti Alaoui, Head of Cooperation Department, National Radio Company (SNRT)
3. Ms. Fatema El Moumen, Director, Relations with international organizations, National Radio Company (SNRT)
4. M. Mohamed Rakib, Head of Audiovisual Documentation, National Radio Company (SNRT)
5. Ms. Meriem Khatoury, Director, Ministry of Communication, Division of Audiovisual media, film and NIT – Department of Research and Media Development
6. Mr. Loutfi Fahsi, Head of Research and Development Department, High Authority for Audiovisual Communication (HACA)
7. Mr. Tariq Khalami, Head of Division for Promotion and Cooperation, Moroccan Film Centre (CCM)
8. Ms. Ouifak Lahlou, Head of Department in charge of Programmes, SOREAD-2M
9. Mr. Abdelhamid Karim, Head of Audiovisual Documentation Division, SOREAD-2M
10. Mr. Farid Ben Yakhlef, Director, RECOM Production /Association of audiovisual companies (ASESA)
11. Mr. Younès Alami, Executive Director, Marocmétrique
12. Mr. Sarim Fassi-Fihri, Film Producer and director general, CNEDINA (Casablanca Studios)

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