MAPPING DIGITAL MEDIA:
MOROCCO

OPEN SOCIETY
FOUNDATIONS

Mapping Digital Media:
Morocco

A REPORT BY THE OPEN SOCIETY FOUNDATIONS

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Mapping Digital Media

The values that underpin good journalism, the need of citizens for reliable and abundant information, and the importance of such information for a healthy society and a robust democracy: these are perennial, and provide compass-bearings for anyone trying to make sense of current changes across the media landscape.

The standards in the profession are in the process of being set. Most of the effects on journalism imposed by new technology are shaped in the most developed societies, but these changes are equally influencing the media in less developed societies.

The **Mapping Digital Media** project, which examines the changes in-depth, aims to build bridges between researchers and policy-makers, activists, academics and standard-setters across the world. It also builds policy capacity in countries where this is less developed, encouraging stakeholders to participate and influence change. At the same time, this research creates a knowledge base, laying foundations for advocacy work, building capacity and enhancing debate.

The Media Program of the Open Society Foundations has seen how changes and continuity affect the media in different places, redefining the way they can operate sustainably while staying true to values of pluralism and diversity, transparency and accountability, editorial independence, freedom of expression and information, public service, and high professional standards.

The Mapping Digital Media project assesses, in the light of these values, the global opportunities and risks that are created for media by the following developments:

- the switchover from analog broadcasting to digital broadcasting,
- growth of new media platforms as sources of news,
- convergence of traditional broadcasting with telecommunications.

Covering 60 countries, the project examines how these changes affect the core democratic service that any media system should provide—news about political, economic and social affairs.

The aim of the Mapping Digital Media project is to assess the impact of these changes on the core democratic service that any media system should provide, namely news about political, economic and social affairs.

The **Mapping Digital Media** reports are produced by local researchers and partner organizations in each country. Cumulatively, these reports will provide a much-needed resource on the democratic role of digital media.

In addition to the country reports, the Open Society Media Program has commissioned research papers on a range of topics related to digital media. These papers are published as the **MDM Reference Series**.

Mapping Digital Media: Morocco Executive Summary

Before the 1990s, the culture of media in Morocco was authoritarian, administrative and partisan. This changed incrementally during the political liberalization and democratization that marked the second half of the 1990s, and consolidated under King Mohammed VI, who came to power in 1999.

All sectors—print, broadcast and digital—witnessed significant growth during the period. Under the impact of the rise of Arab satellite broadcasting, the partial liberalization and modernization of the audiovisual sector allowed new commercial radio and TV stations to emerge. The establishment of the High Authority for Audiovisual Communication (HACA) created the appropriate institutional framework. The new market-oriented media landscape has reduced mass media reliance on government funding and loosened government coercion.

The major new entrants in the news sector are commercial radio stations. By virtue of the 2004 Audiovisual Communication Law, the number of commercial radio stations increased from two in 2006 to 18 in 2009. The new stations reinvigorated pluralism and diversity, especially through live debates and news. They created the possibility for national debates on a variety of issues. Unlike public TV, private radio news program tend to focus on local, regional, and national events. They tend to use a language that is accessible to their listeners, somewhere between modern standard Arabic and Darija,[1] and have provided access to media for variety of different types of voices, information and viewpoints.

However, the new openness has strict limits. There have been setbacks in both media freedom and human rights in the last three years. While the pluralism and diversity of Morocco's media are unprecedented in the Arab world, the authorities continue to use legal and financial penalties to keep the most critical outlets in line.

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1. *Darija* is the Arabic dialect spoken in Morocco, Algeria and Tunisia. It is an oral language, not used in writing. The official language is Arabic.

The government tolerates mild criticism, but censorship—above all, self-censorship—is a recurring feature of Moroccan journalism. Journalists avoid the three taboo areas of the monarchy, Islam, and territorial integrity (southern Sahara provinces). These taboos are carefully respected by the two public service stations, 2M and Al Oula.

Government interference continues to be unpredictable, inconsistent, and repressive. Above all, the government keeps its traditional prerogatives over television, which is still overwhelmingly government-owned, with editorial policies to match. There are no mechanisms of regulatory independence. Both the Press Code (which regulates print media) and the Audiovisual Communication Law are controlled by government institutions.

The Press Code is not a self-regulatory mechanism; on the contrary, it is a legal instrument imposed on the press. As revised in 2002, it maintains prison sentences and heavy fines for anybody who publishes information deemed by the government to be provocative in any manner, shape or form.

Set out in 2008, Morocco's strategy for digital communication is aimed at situating Morocco as a technology hub in North Africa by providing broadband and high-speed internet access at a national level by the end of 2013. Nevertheless, although full digital switchover is expected by 2015, Morocco has not yet started the process of digital switchover. The framework of policy and law is not yet adequate to the challenges of traditional media, let alone digitization.

Most households are not equipped to access content provided by digital media, although recent developments in the telecom sector show that this situation will change in the near future. Internet services provide the only digital interactive platform in Moroccan media space. The number of internet users grew by an estimated 60 per cent from 2005 to 2010. The internet is now the communication platform preferred by Moroccan youth.

However, internet access and use are currently limited to urban areas and to educated urban segments of the population. Personal computers and internet access are beyond the purchasing power of most Moroccans. Although the percentage of internet users in Morocco is high at 33 percent, the majority of internet users use the internet mainly for entertainment. Most broadcast and print outlets have websites but illiteracy and digital illiteracy prevent these new platforms from becoming important sources of news and information. This is why the impact of new media on the average Moroccan's consumption of news remains minimal.

The very high penetration of mobiles has not yet produced much change in media consumption. Attempts to use mobile phones to provide news and information contents have not succeeded. Except for audio and video streaming, specific multimedia contents are non-existent and interactivity is minimal. Even though news delivery on these platforms is still of such limited significance, a pre-existing legal framework is already in place to control news delivery on the internet and mobile platforms.

Social media, meanwhile, are booming. With an estimated 3 million users, Morocco has the third largest Facebook community in the Arab world after Egypt and Saudi Arabia. Social media are increasingly crucial

for political activism. However, their overall impact is also insignificant because of low internet penetration, and also the low level of political engagement. (In the 2007 elections, voter turnout was 37 per cent, the lowest in Morocco's history.)

The impact of digitization on journalists' work so far is negligible, except for coverage of economics, which has benefited hugely from online access to company reports and other documents. It is also clear that the impact of the internet on journalists' ethics has been negative. Patterns of data theft and plagiarism have increased.

Traditional media, meanwhile, appear unable to broaden their appeal. One reason for this is language. The public service television stations and all printed media (with the exception of one magazine and a couple of newspapers) use formal Arabic, which is only understood by an estimated 40 per cent of Moroccans, or formal French, which only 10 per cent of Moroccans understand. This means that, solely by virtue of language, public service television is in clear violation of its mandate to serve all segments of society.

Commercial radio, by contrast, tends to focus on local, regional, and national news. It also tends to use a language that listeners can understand. However, while the new radio stations have triggered an explosion of debate, many crucial topics are still not covered.

Since 1987, the government has awarded fixed subsidies to newspapers and magazines that support its version of political reality. The circulation of all newspapers after the top largest dailies is less than 14,000 each. This is one of the lowest total circulation rates in the Arab world. One reason may be that newspapers have continued the French tradition of providing readers with a flow of heavily editorialized news.

The immense possibilities of digital communication have challenged the scope and capacity of current media policy. Consequently, both the Press Code and the Audiovisual Communication Law are likely to be further reformed, in order to reflect the ongoing democratization process.

In the context of the rise of the internet and mobile phones, the media will undergo a very particular process that can be described as the marginalization of mainstream media and the mainstreaming of marginal media. Citizen journalists, bloggers, and social media communicators will receive attention and audiences, whereas the very impact of the mainstream and conventional media will likely be constrained and have limited societal effects. Mobile phones have the potential to deliver media content to illiterate audiences and can therefore help overcome the problem of access to news. The future of the media in Morocco may lie in the realm of mobile multi-media platforms.

Context

Morocco's economic performance has been steady in the last decade. This was aided by endogenous conditions, enacted in the privatizing and liberalizing trends and policies. The government reformed the financial and telecommunications sectors to attract global investors, while investing heavily in upgrading and expanding infrastructure.[2] Consequently, Morocco has established itself as an offshoring regional hub for Europe's French- and Spanish-speaking companies. According to a McKinsey study, offshoring 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 offshoring is expected within the same period to create 100,000 new jobs.[3]

The steady economic performance is also supported by exogenous conditions in that Morocco enjoys "advanced status" with the European Union, and upholds a free trade agreement with the United States. The economy will gain more global attention with the discovery of about 50 billion tonnes of phosphate, 85 percent of global reserves.[4] However, as the OECD report states, "modernization of government services and the strengthening of the institutional and legal framework need to be pursued to consolidate its gains and entrench long-term growth and human development."[5]

The National Human Development Initiative (INDH), launched in May 2005, was designed to meet the Millennium Development Goals (MDG). From a human resources development perspective, significant resources were invested in the development of education, especially higher education. The higher education system has been revamped to keep up with the recent changes in the professional market place. Other nationwide initiatives such as the National Agency for the Promotion of Work and Skills (ANAPEC) aim at qualifying the Moroccan workforce for the emerging job opportunities, and to satisfy the expectations of foreign investors in a number of sectors such as telecoms, offshoring, and automotive.

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2. Organization for Economic Co-operation and Development (OECD), "Morocco—Investment Policy Review," available at http://www.oecd.org/searchGoogle/0,3547,en_2649_201185_1_1_1_1_1,00.html?cx=012432601748511391518%3Axzeadub0b0a&cof=FORID%3A11&ie=UTF-8&q=Morocco&sa=Search (accessed 9 December 2010) (hereafter OECD, "Morocco").

3. McKinsey & Company, "Morocco's Offshoring Advantage," available at http://www.mckinseyquarterly.com/Moroccos_offshoring_advantage_1683 (accessed 9 December 2010).

4. *Businessweek*, "Phosphate, Morocco's White Gold," available at http://www.businessweek.com/magazine/content/10_46/b4203080895976_page_2.htm (accessed 9 December 2010).

5. OECD, "Morocco."

From the perspective of political stability, the government is pursuing policies to improve social conditions and living standards by improving housing schemes and other social infrastructures. The government has pushed for the creation of massive affordable housing. Tax incentives for private developers encouraged real-estate investors to stream more money to the construction industry. This helped create jobs and benefited low-budget Moroccans, helping to absorb their disenchantment and buy political stability, which in turn attracts more foreign investors. Despite these measures, the Human Development Index ranks Morocco 114 out of 169 countries with comparable data.[6]

The mass media reflect the perspectives of the changes in Morocco over the last decade. During the second half of the 1990s, democratization was in full flower and reached its peak in 1997, when the socialist-led opposition came to power. The media benefited a great deal from this political opening. Before the 1990s, the prevailing media practices were partisan, administrative, and authoritative in nature. The country witnessed significant growth in print, broadcast, and digital media. This indicated a 180-degree turn in the form and function of the media. The new market-oriented media landscape has served to reduce mass media reliance on government funding and to loosen government coercion.

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6. United Nations Development Program (UNDP), "Morocco Human Development Report 2010," available at http://hdrstats.undp.org/en/countries/profiles/MAR.html (accessed 15 December 2010).

Social indicators[7]

Population (number of inhabitants): 31.17 million (2008)

Number of households: 6.23 million (2008)

Figure 1.

Rural–urban breakdown (% of total population)

Rural 37.1%   Urban 62.9%
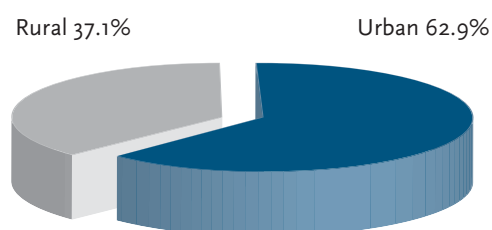
Figure 2.

Ethnic composition (% of total population)[8]

Mixed Arab/Amazigh 60%   Amazigh 40%

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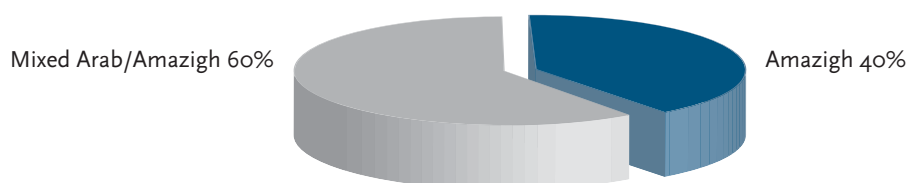
7. Haut Commissariat au Plan (High Commission of Planning), Direction de la Statistique, *Rapport Annuel* (Annual Report) 2007, 2008, available at http://www.hcp.ma (accessed 14 April 2010) (hereafter Haut Commissariat au Plan, *Rapport Annuel* 2007, 2008).

8. There are no official statistics on ethnicity in Morocco. L' Institut Royal de la Culture Amazigh (Royal Institute of Amazigh—IRCAM) culture does not have or refuses to share data. Plausible estimates state the percentage of Amazigh to be 40% (see Figure 2). Numbers are available at at http://www.le-maroc.org/Culture-et-Population.htm; http://www.bibliomonde.com/donnee/maroc-les-langues-32.html (accessed 14 December 2010).

Figure 3.a

Linguistic composition (% of total population)[9]

Spoken languages for people of five years and over
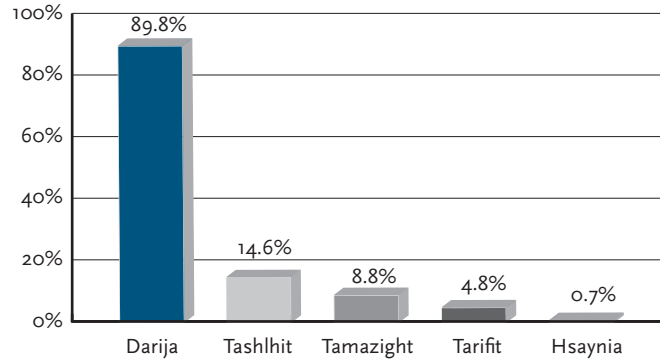
Source: Haut Commissariat au Plan.
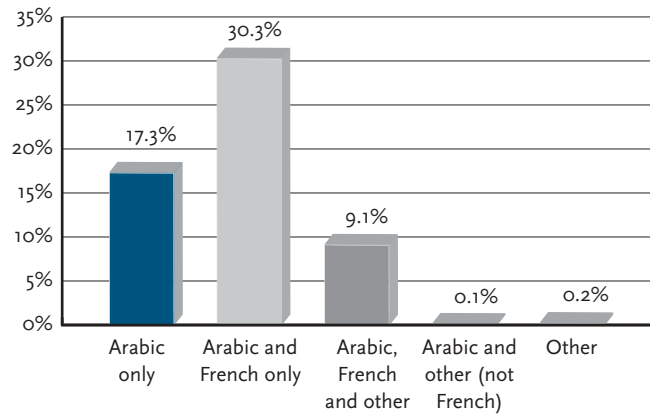
Source: Haut Commissariat au Plan.

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9. Haut Commissariat au Plan, *Recensement Général de la Population et de l'Habitat 2004*, available at http://www.hcp.ma/Profil.aspx (accessed 14 December 2010) (hereafter Haut Commissariat au Plan, *Recensement*).

Figure 3.b

Linguistic composition (% of total population)

Written and read languages for people of 10 years and over
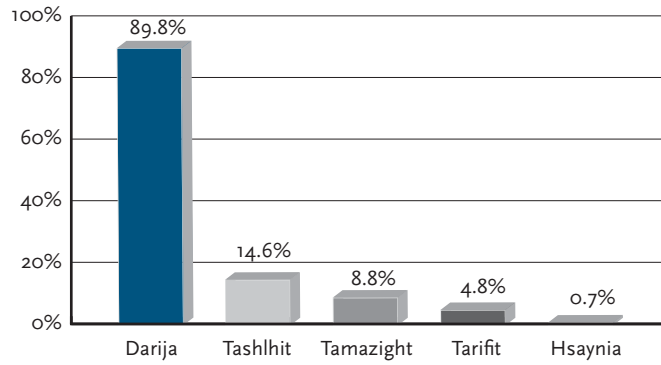
Source: Haut Commissariat au Plan.
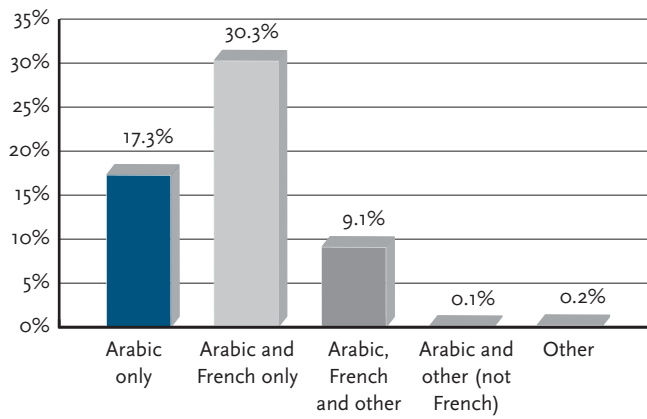
Source: Haut Commissariat au Plan.

Figure 4

Religious composition (% of total population)
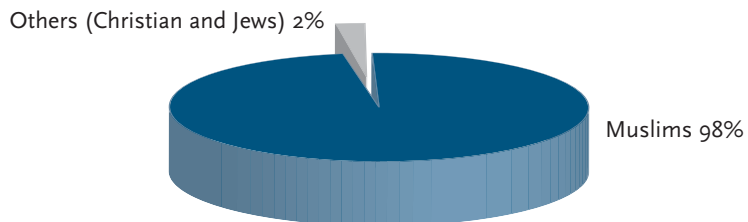
Table 1

Economic indicators

	2005	2006	2007	2008	2009	2010	2011f	2012f
GDP (current prices), total in US$bn	59,524	65,640	75,223	88,879	90,815	94,035	99,974	107,245
GDP (in US$, current prices) per head	1,966	2,141	2,426	2,827	2,864	2,941	3,100	3,298
Gross National Income (GNI), current US$, per head	3,450	3,790	3,980	4,230	4,400	n/a	n/a	n/a
Unemployment (% of total labor force)	11.1	9.7	9.8	9.6	9.1	n/a	n/a	n/a
Inflation (average annual rate in % against previous year)	0.9	3.2	2.0	3.8	0.9	2.0	2.6	2.6

Notes: n/a: not available; f: forecast.

Sources: Haut Commissariat au Plan (for unemployment indicators); International Monetary Fund (IMF), 2010 (GDP and inflation).

1. Media Consumption: The Digital Factor

1.1 Digital Take-up

1.1.1 Digital Equipment and Literacy

Most households are not equipped to access content provided by digital media, but recent developments in the telecoms sector show that this situation will change in the near future. Internet access and use are currently limited to urban areas and to educated urban segments of Morocco's population. Rural areas constitute 37.1 percent of the total and many rural dwellers have access to electricity and can therefore access television and radio, but most do not have access to landline phones and the internet. The use of digital media requires digital media literacy, which most Moroccans do not have. There have been attempts to use mobile phones, given their high penetration of 85.82 percent, to provide news and information contents, but such attempts were not successful. (See *section 2.1.2.*)

Table 2
Households owning equipment, 2005–2009

	2005		2006		2007		2008		2009	
	No. of HH[10] ('000)	% of THH[11]	No. of HH ('000)	% of THH	No. of HH ('000)	% of THH	No. of HH ('000)	% of THH	No. of HH ('000)	% of THH
TV set	5,110	82.9	5,299	84.5	n/a	n/a	5,740	89.0	6,179	95.8
Radio[12] set	4,895	79.4	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
PC[13]	813	13.2	1,022	16.3	1,095	17.2	1,741	27	n/a	n/a

Notes: n/a: not available.
Sources: Reporters calculations based on data from Haut Commissariat au Plan; International Telecommunication Union (ITU).

10.   Total number of households owning the equipment.

11.   Percentage of total number of households in the country.

12.   ITU World Telecommunication/ICT Indicators 2010 (Series: proportion of households with a radio; definition: proportion of households with a radio).

13.   ITU World Telecommunication/ICT Indicators 2010 (Series: proportion of households with a computer; definition: a computer includes: a desktop, portable or handheld computer (e.g. a personal digital assistant. It does not include equipment with some embedded computing abilities such as mobile phones or TV sets.) The proportion of households with a computer is calculated by dividing the number of in-scope households with a computer by the total number of in-scope households.)

The most popular sources of news and information remain the two public service TV stations, Al Oula and 2M.[14] This is mainly due to the high rate of illiteracy and to universal access. Considering the former, there are large numbers of non-literate or marginally literate individuals who live out their lives in print-scarce environments with few or no reading materials in their homes, but have easy and regular access to television. In 2004, 43 percent of the population aged 10 and above were illiterate.[15] Among the Moroccans of 15–24 years of age, the illiteracy rate stands at 39 percent for females and at 19.2 percent for males; for 50 years old and older, the rate is 88.8 percent for women and 59.2 percent for men.

Figure 5
Illiteracy rate, by age, gender, and geographical area, 2004[16]
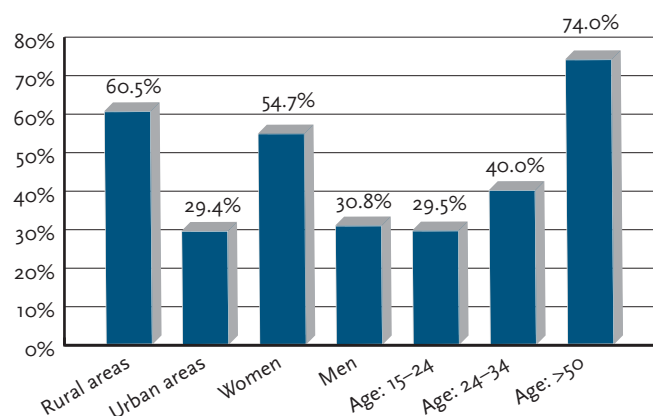
Source: Haut Commissariat au Plan.

Al Oula and 2M are also the most accessible to all audiences because their broadcasts require only an aerial antenna to be received, an item almost all Moroccan households can afford (compared with satellite dishes). Newspaper circulation is at 320,000 daily;[17] less than 1 percent of the population reads a newspaper every day. Finally, according to Marocmétrie, the official Moroccan TV audience ratings firm,[18] the channels had a combined audience share in March 2010 of 40.3 percent, 27.3 percent for 2M and 13.0 percent for Al Oula. However, for high-quality international and global news, educated and urban Moroccans turn to good-quality content channels, including Al Jazeera, other Arab satellite channels, and European global media players. Noteworthy is Al Jazeera's Maghreb evening news program, which is widely watched by educated Moroccans.

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14.   F. Faquihi, "2M Capte plus de téléspectateur qu'Al Oula" (2M captures more viewers than Al Oula), *L'Economiste*, 23 April 2010, p. 12 (hereafter Faquihi, "2M.")

15.   Haut Commissariat au Plan, *Recensement.* Available online at http://www.hcp.ma/pubData/Demographie/RGPH/RGPH_Rapport_National. pdf (accessed 20 May 2010).

16.   The latest available data on this issue date back to 2004. The Moroccan statistics office carries out a census covering these issues every 10 years.

17.   Organisme de justification de la diffusion (OJD), available at http://www.ojd.ma/site/ma/leschiffres.php (accessed 19 November 2010) (here-after OJD).

18.   Faquihi, "2M."

Private commercial radio is another important source of news and information. The High Commission for Audiovisual Communication (*Haut Autorité de la Communication Audiovisuelle*, HACA) was created in August 2002 by royal decree to establish the legal framework for the liberalization of the audiovisual sector. The broadcasting sector was government-controlled until the creation of HACA, and it functioned in a legal void. TV and radio stations were established by royal decrees. In September 2002, HACA promulgated a decree law[19] that ended the government's monopoly of the national broadcasting system and allowed the licensing of new private television and radio stations. Parliament adopted the reform law on 25 November 2004. The law assigns public service obligations to the two major television stations (RTM and 2M).[20] The law also ends the government's monopoly in terms of broadcasting management by transforming Moroccan Radio and Television (RTM) from a subsidiary of the Ministry of Communication into an independent and self-governing body, the National Radio and Television Company (*SociétéNationale de Radiodiffusion et de Télévision*, SNRT). The SNRT is a public company that manages both television stations, but is no longer subject to financial control and supervision by the Ministry of Communication. RTM[21] was renamed Al Oula (meaning the first in Arabic). The two stations were obliged to grant a significant portion of their programs to national productions and increase the percentage of development-oriented programs.

Therefore, by virtue of the audiovisual communication law, the number of TV channels increased from three stations in 2004 to eight in 2008.[22] The number of radio stations increased from six stations in 2006 to 24 in 2008. Of these radio stations, 18 are new private stations.[23] Eight are regional and the others are national.[24]

The new private radio stations reinvigorated the broadcast landscape especially through their live debate shows and news programs. They introduced the impetus and space to create possibilities for national debates on a variety of social, educational and health-related issues. In a country as diverse as Morocco, a multitude of voices vie for a share of the national conversation. Most debate programs happen during morning, early afternoon, and early evenings, and participation in these shows is quite high.[25] Unlike public TV, commercial radio news programs tend to focus on local, regional, and national events. They tend to use a language that is

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19. HACA, *Loi relative à la communication audiovisuelle* (Audiovisual Communication Law), Dahir no. 1-04-257, Law no. 77-03, available at http://www.haca.ma/pdf/commaudiovisuelle.pdf (accessed 15 April 2010).

20. 2M was launched as a private subscription-based TV station in 1989, then turned public after it faced tough financial difficulties in 1996.

21. On April 2007, the SNRT changed the name of RTM to Al Oula. The name "Al Oula" will be henceforth used to refer to this television channel.

22. HACA, "List of TV stations," available at http://www.haca.ma/indexFr.jsp?id=64 (accessed 12 May 2010) (hereafter HACA, "List of TV stations").

23. HACA, "List of TV stations."

24. Regional stations cover at least two of the following 12 regions: Grand Casablanca (1), Rabat/Sale (2), Fes/Meknes (3), Phosphate plains and Tadla (4), Centre provinces (5), Marrakech (6), North provinces (7), Rif provinces (8), Souss Massa (9), Oriental (10), Desert gates (11), and Sahara provinces (12). The private radio stations are: Radio Sawa, Chada FM, Aswat, Radio Plus Agadir, Radio Plus Marrakech, Atlantic Radio, MFM Atlat, MFM Souss, MFM Sahara, MFM Oriental, MFM Sais, Cap radio, Radio Mars, Radio Med, Median FM, Luxe radio, Hit radio, and Casa FM. With the exception of Hit Radio (music) and Radio Mars (Sport), all other radio stations offer a mix of public affairs, news and information programs, and music.

25. There are no statistics on private radio ratings, but based on interviews conducted with five private radio stations, one indication of popularity is that the phone does not stop ringing during debate shows.

understandable by their listeners, somewhere between modern standard Arabic and Darija.[26] It is important to note that while there is an explosion of debates thanks to the advent of new radio stations, many crucial subjects especially in politics are not debated.

Internet access has improved and widened considerably since 2005. The number of internet subscribers grew by an estimated 60 percent from 2005 to 2010.[27] Since high-speed internet access became available in 2004, Moroccans have started to use it. In 2009,[28] the number of subscribers to the internet reached 1.2 million, 3.75 percent of the population. Of these, 54 percent use 3G, more than 566,000 customers, 1.8 percent of Morocco's population. The number of cybercafés had reached 8,950 in 2009. According to the Network Information Centre,[29] which manages the domain ".ma", there were 36,024 registered domain names in 2010.

By March 2010, the number of mobile phone subscribers reached 27 million,[30] with a growth of 6.86 percent (compared with2009) and a penetration rate of 85.82 percent. According to ANRT, the prepaid sector accounts for 82.53 percent of the Moroccan mobile market and has seen a growth of 7.04 percent.

According to the ICT Development Index (IDI) of the International Telecommunication Union (ITU),[31] Morocco's ranking among Arab countries did not change considerably between 2002 and 2007. However, the country has significantly improved its ICT levels, and has achieved the highest relative gain in IDI value among all Arab states, with a 71 percent growth in the five-year period**.** Morocco has gained mainly in ICT access, mobile penetration (from 21 percent to 64 percent) and internet bandwidth (from 310 to 25'130 Mbits/s), and skills (secondary enrolment ratio increased to 56 percent in 2007). Both fixed and mobile broadband penetration remains nevertheless very low in the country.[32] In addition, ICT skills criteria such as adult literacy rate, tertiary gross enrolment ratio, and ICT access criteria such as proportion of households with computer and proportion of households with internet access, handicap Morocco's IDI rating, placing it 14th out of 18.

Many policymakers are aware of the digital divide and believe that universal access is a goal the government ought to pursue. In October 2009, the government launched the national strategy "*Maroc Numérique 2013*" (Digital Morocco 2013).[33] The government signed an agreement with banking institutions to implement

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26. Darija is the spoken language of Moroccans. It is a variation of Arabic and refers to the dialect spoken in Morocco, Algeria, and Tunisia. It has a few vocabulary words from French, Tamazight, and Spanish. It is an oral language, not used in writing. The official languages are modern standard Arabic and French.

27. ANRT, *Tableau de bord trimestriel du marché Internet Mars 2010*,4 May 2010, available at http://www.anrt.ma/fr/admin/download/upload/file_fr1891.pdf (accessed 2 June 2010).

28. ANRT, *Tableau de bord trimestriel du marché Internet Décembre 2009*, 25 February 2010, available at http://www.anrt.ma/fr/admin/download/upload/file_fr1874.pdf (accessed 2 June 2010) (hereafter ANRT, *Tableau de bord du marché Internet Décembre 2009*).

29. Network Information Centre, *Statistiques*, available at http://www.nic.ma/statistiques.asp (accessed 4 June 2010).

30. ANRT, *Tableau de bord trimestriel du marché Mobile Mars 2010.* 4 May 2010. http://www.anrt.net.ma/fr/admin/download/upload/file_fr1888.pdf (accessed 2 June 2010).

31. ITU, "Information Society Statistical Profiles 2009: Arab States 2009," available at http://www.itu.int/ITU-D/conferences/rpm/2009/arb/documents/ICTProfileARB-en.pdf (accessed 20 June 2010) (hereafter ITU, "Arab States 2009").

32. ITU, "Arab States 2009," pp. 40–41.

this project, which is worth MAD5.2 billion (about US$520 million). This project aims at nationwide access to high-speed internet by 2013. It also aims to develop e-government programs to bring the administration closer to citizens and promote small and medium-sized enterprises to adopt information and communication technologies. One of the top priorities of the Government's reform agenda is the modernization of the telecoms sector and the upgrade of the telecoms infrastructure.

The ANRT launched the PACTE (*Programme d'Accès Généralisé aux Télécommunications*, Program of Generalized Access to Telecommunications) project in 2008.[34] In collaboration with the Ministry of Interior, the ANRT conducted a survey of communities with no access to telecoms services. They found 9,263 communities without this access. The PACTE project aimed to provide all these communities with telecoms services by 2010. Two million Moroccans, 17 percent of the population in rural areas, will benefit from this project, which has a budget of US$14.4 million. The financing comes from the Universal Service Fund for telecommunications, created in 2005, to which the three telecoms operators (Maroc Telecom, Medi Telecom, and Wana Corporate) contribute 2 percent of their annual gross income.

Another government initiative is the GENIE project (*Genéralisation des TIC dans l'Enseignement*, Generalization of ICTs in Education).[35] Launched in March 2005, GENIE aims to extend the use of ICTs throughout the public (as opposed to the private) education system. The three main pillars of the project are building infrastructure, teacher training, and making digital resources available for students and teachers. In 2008, a study to evaluate the project outcomes found that 75 percent of multimedia classrooms were open for students to use. Some 1,878 public schools were connected to the internet and 25,000 teachers were trained. As a response to these results, a new road map was laid out for 2009–2013, whereby GENIE becomes part and parcel of national education reform. It aims to improve the training and professional development of teachers and encourage the adoption of ICTs by public school students. The project assigned a minimum weekly ICT usage of between three and four hours a week by elementary and high-school teachers and students. The objective for 2013 is to train 208,000 public school teachers in the use of ICTs for education. The project is not progressing as planned. By the end of 2009, the objective was to train 68,681 teachers and to provide ICT equipment for 838 schools. In fact, the project actually trained only 48,813 teachers and did not equip any of the 838 schools. The introduction of equipment in schools was postponed to the last quarter of 2010. The initial objective for the year 2010 was to equip an additional 2,119 schools on top of the original 838 schools.[36]

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33. Maghreb Arab Press (MAP), "HM the King chairs presentation ceremony of national strategy 'Maroc Numeric 2013'," 10 October 2009, available at http://www.map.ma/eng/sections/royal_activities (accessed 9 April 2010).

34. ANRT, *Rapport Annuel*(Annual Report), 2008, available at http://www.anrt.net.ma/fr/admin/download/upload/file_fr1702.pdf(accessed 4 June 2010) (hereafter ANRT, *Rapport Annuel*, 2008).

35. ANRT, *Rapport Annuel*, 2008.

36. GENIE Project, *Premier bilan de la stratégie 2009–2013* (First balance of the strategy 2009–2013), available at http://www.genie.gov.ma/revues.htm (accessed 11 August 2010).

1.1.2 Platforms

The platforms that carry news and information are the following in the order of importance measured by audience share: terrestrial TV and radio, satellite TV, internet, newspapers, and magazines. Terrestrial television and radio are the most accessed sources for news and information, due to the low cost, ability of TV and radio to move beyond issues of illiteracy and universal access. Newspapers are other providers of news and information but the circulation rate is 320,000 copies a day, that is, less than 1 percent of the population reads newspapers. The top five newsmagazines sell about 20,000 copies a week each.[37]

The internet is a platform that also carries news and information. The internet use is estimated at 33 per cent with roughly 10 million users.[38] Most broadcast and print outlets have websites but illiteracy and ICT illiteracy prevent these new platforms from becoming important sources of news and information. TV via ADSL, a digital TV service provided by Maroc Telecom, is even less significant in terms of audience share with 0.03 percent penetration rate. There were only 10,000 subscribers to this service as of 2008.

Table 3

Platform for the main TV reception and digital take-up, 2005–2009[39]

	2005		2006		2007		2008	
	No. of HH[40] ('000)	% of TVHH[41]	No. of HH ('000)	% of TVHH	No. of HH ('000)	% of TVHH	No. of HH ('000)	% of TVHH
Terrestrial reception:[42]	n/a	n/a	n/a	n/a	n/a	n/a	5,185	80.4
of which digital (ADSL)[43]	n/a	n/a	n/a	n/a	n/a	n/a	1,935	0.03
Cable reception:				n/a				
of which digital				n/a				
Satellite reception:[44]	2,385	38.7	2,765	44.1	n/a	n/a	3,831	59.4
of which digital				n/a				
Total:				n/a				
of which digital				n/a				

Note: n/a = not available.

Sources: Direction de la Statistique, HautCommissariat au Plan; Mindshare; ANRT.

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37. OJD.

38. Internet world stats, Internet Usage Statistics for Africa, available online at http://www.internetworldstats.com/stats1.htm#africa (accessed 30 May 2011).

39. The figures refer to the main TV set in the households for multi-TV households.

40. Total number of households owning the equipment.

41. Percentage of total number of TV households (TVHH) in the country.

42. Mindshare, *Media Scene in Morocco 2008*, unpublished document.

43. ANRT, *Rapport Annuel* (Annual Report), 2009, available online at http://www.anrt.ma/fr/admin/download/upload/file_fr2034.pdf (accessed 14 December 2010) (hereafter ANRT, *Rapport Annuel* 2009).

44. Haut Commissariat au Plan, *Rapport Annuel* 2006, 2008.

Table 4

Internet penetration rate (total internet subscriptions as % of total population) and mobile penetration rate (total active SIM cards as % of total population), 2005–2009[45]

	2005	2006	2007	2008	2009
Internet:	0.8	1.2	1.6	2.3	3.7
of which broadband	n/a	n/a	0.1	0.8	39.9
Mobile telephony:	41.4	53.5	65.6	73.9	81.1
of which 3G	n/a	n/a	n/a	35.4	59.5

Note: n/a = not available.

Source: ANRT.

1.2 Media Preferences

1.2.1 Main Shifts in News Consumption

There has been a limited migration to digital transmission, with new digital platforms for news and information. Content providers continue to use their old media platforms while providing the same contents on the new digital platforms. There have been some major changes (in terms of audience share) in news and information consumption and these relate mainly to the tendency among urban youth to seek news and information from online sources.

In March 2007, the Ministry of Communication introduced the Digital Terrestrial TV DTT (*Television Numerique Terrestre*, TNT).[46] DTT service requires connecting a DTT receiver to an UHF (ultra high frequency) antenna and allows the reception in digital format of all government-owned radio and television channels. Viewers have free access to the digital programming of the two channels Al Oula and 2M, the three thematic TV stations Arryadia, Arrabiâ, and Assadissa, and four SNRT radio stations (Al Idaa Watanya, Inter Channel, Al Idaa Amazighiya, and Idaat Mohammed VI). In May 2008, the service was extended to include Aflam, a movie channel.

The cost of this initiative for the government is US$12 million to deliver free digital content. The DTT service is currently available to 80 percent of Moroccans. However, only 100,000 DTT receivers have so far been sold, representing some 0.3 percent of households. The low success of DTT in Morocco is partly due to the high proportion of TV households that still access television via analog terrestrial antennas and via satellite, and do not throng to purchase a digital receiver. Full digital switch-over is expected by 2015.

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45. ANRT, *Rapport Annuel* 2009.

46. La Société Nationale de Radiodiffusion et de Télévision (SNRT), available at http://www.snrt.ma/tnt.php (accessed 30 May 2010).

On 19 May 2006, Maroc Telecom obtained the authorization of the HACA to broadcast programs from national television stations and many international channels via ADSL. Only Moroccans with access to the internet can take advantage of this service. In December 2008, the number of subscribers was 10,000, i.e. 0.03 percent of the population.[47]

1.2.2 Availability of a Diverse Range of News Sources

The new opportunities for news dissemination did not improve the diversity in news offer in a substantial manner. The major improvements that occurred in Morocco are due to the new political environment and the democratization process under the reign of King Mohammed VI. After he succeeded his father Hassan II in July 1999, Mohammed VI instantly became a symbol of hope for a more democratic and free Morocco. Unlike his father, whose 38-year rule was stained by human rights violations, corruption, and a discredited political system, Mohammed VI, famed in the Moroccan and foreign media as the "king of the poor", embodied modesty, social justice, and moderation. He made the promotion of human rights a priority.

One of the first major pro-human rights measures under his reign was the 2003 creation by royal decree of the Forum for Equity and Reconciliation,[48] which investigated human rights violations inthe past. Besides establishing the truth about past violations, the Commission organized public forums in 2004 to allow victims to voice their pain and suffering under the old regime. These forums were broadcast live on TV, which constitute a very important moment in Moroccan television history. The goal of the Commission was to facilitate the reconciliation of Moroccans with their recent past.

Another major initiative was the new Family Status Law or *Moudawana*, decreed in 2003 to protect women's rights. A Freedom House's study[49] on women in Morocco praised this initiative and noted the improvements of the status of women and their rights. Mohammed VI also created the Royal Institute of Amazigh Culture (*L'Institut Royal de la Culture Amazighe*, IRCAM),[50] to safeguard and promote Amazigh language and culture. The Imazighen constitute a large ethnic group in Morocco, yet Amazigh culture was undermined for many years. For political reasons, Hassan II's regime identified with Arabism, hence the predominance of Arabic culture and identity.

The new political environment is now more open and conducive to more freedom than it was during what is referred to as "the years of lead," from 1961 to 1999. Mohammed VI's reign is more democratic in form and substance. Many taboos have beenbroken, from reporting on the king's salary to reporting on the arrest of high officials close to the palace. Journalists denounce corruption, and some have called for the resignation

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47. Maroc Telecom, *Rapport Annuel* (Annual Report) *2008*,12 December 2008, available online at http://www.iam.ma/Lists/Tlchargement%20 Finance/Attachments/248/Maroc-Telecom-Rapport-Annuel-2008.pdf (accessed on 10 June 2010); ITMaroc, *Hausse des abonnés* (Rise of sub-scribers), 9 March 2010, available at http://www.itmaroc.com/internet/hausse-des-abonnes-pour-maroc-telecom-wana-et-meditel.html (accessed 20 June 2010).

48. Instance Equité et Réconciliation, available at http://www.ier.ma/?lang=en (accessed 6 June 2010).

49. B. Katulis, "Women's Freedom in Focus: Morocco, "Freedom House, 5 March 2004, available at http://www.freedomhouse.org/uploads/special_report/32.pdf (accessed 6 June 2010) (hereafter Katulis, "Morocco").

50. The institute's website is http://www.ircam.ma/ (accessed 6 June 2010).

of many powerful government and army personalities, something that was inconceivable during the reign of Hassan II. The last decade witnessed an unprecedented opening of the political system.

The liberalization of the audiovisual sector, triggered by the creation of HACA and the 2004 Audiovisual Communication Law allowed new private radio and TV stations to emerge. The print press also became considerably diversified and relatively competitive and is gradually developing into a professional press. The newspapers with the highest circulation are private newspapers. Morocco's national press used to be predominantly political party newspapers, and they lacked aggressiveness in putting forward their political opinions. One explanation for this is that the political values and standpoints of these papers reflect the interests of their readers, who were and are party members. Unlike the new independent and private newspapers, political parties' newspapers reflect the political views and ideas of their particular parties. The private press targets a middle-class mass market, filling the void left by the party press.

The new political environment also prompted diversity in the magazines industry. The democratization process gave these a circulation boost. Rapid growth occurred in both the number and in the circulation of private magazines. However, many international press freedom organizations have expressed serious concerns about the decline in press freedom in the country since 2005. The Reporters without Borders' (RSF) 2009 report ranked Morocco 127 out of 175 countries. The report points out that press freedom has lost its hard-won ground. While there has been an increase in the private press in recent years, creating a degree of pluralism and diversity unprecedented in the Arab world, the Moroccan authorities have continued to use legal and financial penalties "to keep the most outspoken media in line."[51]

With digital media, several online news and information providers were launched. Most of these are online versions of existing TV and radio stations, newspapers and magazines. For broadcast media, the online versions are new platforms for disseminating their analog content. In addition to their print contents, online versions of traditional newspapers include transcripts of interviews, speeches, extensive tables and graphs. The new websites are also interactive, using email, feedback forms, short opinion surveys; some plan to introduce chat-rooms. They are also experimenting with videonews, links to other websites, archives, and user comments.

Nevertheless, the quality and number of services offered by the online editions are quite limited. A study of 18 Arabic and French-language newspapers and magazines, and major television and radio stations in spring 2010 found that the most developed versions of these media online carried updated contents from both the print version and the archives, as well as some basic portal services such as stock exchange information, calendar of upcoming events, weather forecasts, short surveys, pdf versions of the latest issue of the newspaper, classified ads, calls for tenders, Moroccan and international TV schedules, and local information concerning all-night pharmacies and cinema programs.[52] Except for audio and video streaming, specific multimedia content is non-existent and there is rarely the possibility to leave a comment, or to share and circulate

51. RSF, "Country Report Morocco," available at http://en.rsf.org/report-morocco,160.html (accessed 19 November 2010) (hereafter RSF, "Morocco").

52. S. Kocergin and S. Rahbaoui, Working title "Mapping Moroccan Online Landscape (in Progress)," unpublished paper, 2010.

information via Twitter, Facebook, RSS feeds, and other sharing tools. Features including moderated and facilitated forums and discussion, specially designed online events, interviews and chats, instant messaging, blogs, customized contents, advanced research functions, user-generated article ratings, video streaming, partnerships, and services are completely absent from the major websites offered by traditional media outlets.

Currently, no newspapers have opted to exist only online, ceasing print publication. Most of the publications studied that offer a website version accept advertising. Other outlets, such as Menara.ma, Hespress.com, Goud.ma, Lakome.com, Hibapress.ma, Biladi.ma, Yabilady.com, and emarrakech.info are all online publications with no print versions. They contain forums and discussion, interviews, dating services, blogs, video streaming, sharing information via Facebook, and RSS feeds. Hespress, an Arabic website focusing on Moroccan information, has the greatest reach[53] among identified news websites, popular in Morocco as well as abroad, possibly among Moroccan communities abroad. Hespress is considered to be user-generated, although most of the articles published come directly from traditional media online sources.

According to Maroc Telecom's 2008 Annual Report, Menara.ma is one of the leading websites in terms of audience share, with more than 50 million visits. According to the same report, it is also the first job search website, with more than 130,000 subscribed candidates and about 4,000 hiring companies. There were 15,000 job offers published in 2008.

Table 5
Traffic statistics of Menara.ma*

Country		Worldwide
Unique visitors (estimated cookies)	470,000	510,000
Unique visitors (users)	350,000	350,000
Reach	5.2%	0.0%
Page views	9,900,000	9,900,000
Total visits	3,100,000	3,200,000
Average visits per visitor	8.7	9.0
Average time on site (minutes)	7:40	7:20

Note: * = estimates.
Source: DoubleClick Ad Planner by Google.[54]

The Al Massae website was re-launched in 2010 and provides the most advanced online version of Moroccan Arabic-speaking dailies. The design is modern and the website provides an interactive service that includes images and a video library of important video-events.

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53. Google Ad Planner, hespress.com, available online at https://www.google.com/adplanner/planning/site_profile?hl=en#siteDetails?identifier=hes press.com&geo=MA&trait_type=1&lp=true (accessed 30 May 2011).

54. DoubleClick Ad Planner by Google, May 2010, available at https://www.google.com/adplanner/site_profile#siteDetails?identifier=menara. ma&geo=MA&trait_type=1&lp=false (accessed 20 June 2010).

In terms of media consumption, one of the structural problems of Moroccan online media is the low rate of literacy and the lack of internet access for most Moroccans living in rural areas. The availability of a diverse range of news and information affects only a small segment of the population.

1.3 News Providers

1.3.1 Leading Sources of News

1.3.1.1 Television and Radio

For TV, the top five news and information providers in terms of audience share are 2M, Al Oula, Al Jazeera, Al Arrabiya, and Medi 1 TV. For radio the top five providers are Media 1, Radio 2M, SNRT Arabic, Radio Mohammed VI, and Aswat.[55]

The ranking has changed since 2005, due mainly to the emergence of many private radio stations. Al Oula and 2M remain the most accessed sources of news and information because of their historical significance in the media scene. Al Oula was created in 1962 and was the only TV channel until2M was created in 1989. Besides public radio and to a much less extent newspapers, Al Oula was the only source of information and entertainment for three decades. 2M SOREAD was launched as one of the first private television stations in the Arab world. The channel's self-proclaimed function was to entertain. News bulletins were short, in form of news briefs. The French language predominated, with 80 percent of programs in French. It was subscription-based and needed a decoder to receive clear signals until January 1997, when it turned public and its signals only needed a regular aerial antenna to be received. 2M suffered financial difficulties due to the fact that an increasing number of subscribers cancelled their subscriptions in favor of free and often more interesting programs on various satellite television channels.

The takeover by the government was carried out in the name of preserving freedom of speech, which 2M had come to symbolize. Politicians from different ideological streams supported the move since 2M was seen as the only national channel open to political debates. 2M brought in a breath of fresh air for most Moroccans who were unsatisfied with the programs of Al Oula (known then as RTM). 2M broke certain long-standing taboos and tackled controversial issues. The first taboo it broke was manifested in the format of its news bulletin. Contrary to Al Oula, the format was rather compact and its content was not necessarily focused on the daily engagements of the king or the government. It addressed these issues with brevity and more objectivity than Al Oula.

2M also featured programs on what were then considered controversial issues such as poverty, corruption, and government ineffectiveness. For the first time, ordinary citizens were allowed to speak on a microphone and tell their compatriots and the world what they thought. It is important to note that journalists, academics,

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55. Mindshare, "Media Scene in Morocco 2008," unpublished document.

and civil rights activists have in recent years expressed serious concerns about 2M's treatment of political news. It has become as stultified as Al Oula. Moreover, 2M journalists' unions have repeatedly criticized the government political pressure and editorial interference on their network.

The new private radio stations reinvigorated the audiovisual sector especially through their live debates and news. Because of their proximity to their audiences, they opened a new space where Moroccans could discuss their everyday concerns. Issues aired include marriage, health, new traffic laws, domestic violence, child labor, and mental health. Another source of appeal of these new radio stations is their news programs, which focus on local, regional and national issues which makes them attractive to the average audience.

1.3.1.2 Print Media

It is difficult to draw a clear distinction between tabloid and non-tabloid news and information providers. Regarding the printed press, far from providing their readers with factual and unbiased news reporting, newspapers have continued the French tradition of providing their readers with a steady flow of editorialized news. Most newspapers are owned by political parties, and they tend to reflect the political values and standpoints of their readers who are mostly party members. These newspapers tend to steer away from gossip columns and sensational news because it would reflect poorly on their image. It is important to note that most political party newspapers have insignificant circulation rates. Private newspapers offer a wide range of news and information. They do cover crime stories and provide articles on some world celebrities because of the marketing value of these sensational stories, but the majority of their stories consist of political, social, cultural, and sports news.

Besides, the lack of the notion of stardom and celebrity culture is responsible for the absence of tabloid news and information providers. The personal lives of music or sports celebrities are not relevant for Moroccans. The royal family is protected by both the Press Code[56] (that regulates print media) and the 2004 Audiovisual Communication Law. Any reporting on this subject is punishable by law, and involves not only heavy fines but also jail terms of up to five years. Journalists tend to stay away from such topics.

The print media editorial spectrum ranges between secular leftist, religious conservative, and nationalist. As of December 2005, there were 20 political party newspapers and six private newspapers, 19 in Arabic and seven in French. The total combined circulation was 320,000 per day; less than 1 percent of the population reads a newspaper every day.

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56. Ministry of Communication, *Le Code de la Presse* (Press Code), Dahir no. 1-02-207, Law no. 77-00, available at http://www.mincom.gov.ma/NR/rdonlyres/3451DD5C-F7DB-45D3-A927-D1EB691AD635/904/CodedelaPresse.pdf (accessed 30 April 2010). The Press Code may suggest that this is a self-regulatory mechanism; it is in fact a legal instrument imposed on the press as a law.

Figure 6

The largest daily newspapers, by circulation, 2010
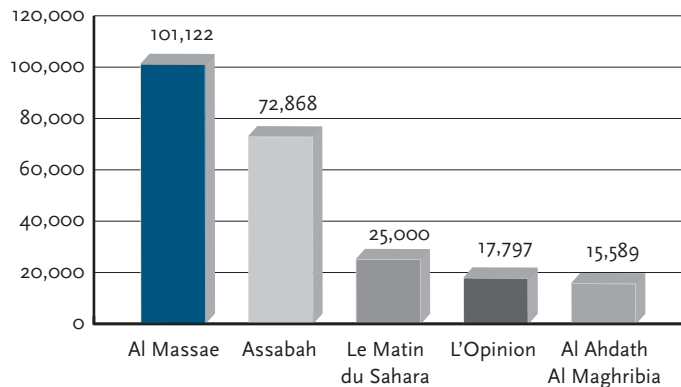
Source: Organisme de justification de la diffusion (OJD), 2010.

The circulation of all newspapers after the top largest dailies is less than 14,000 each. This is one of the lowest total circulation rates in the Arab world.

Worth mentioning is the rise in popularity of the private newspaper *Al Massae*, the only newspaper to exceed a daily circulation of 100,000. It is widely read among the literate urban population and this is mainly due to the style of its director and editor-in-chief, Rachid Niny. His column receives a lot of attention for his sharp criticism of the government and public officials. He also developed a new writing style in Arabic where he mixes modern standard Arabic and Darija. Many newspapers and observers have questioned the ability of this newspaper to survive, considering its forthright criticism of high-profile politicians and businesspersons. They state that the paper must enjoy political backing to remain protected from repercussions.[57]

The newspaper industry has been undergoing rapid modernization with the adoption of advanced printing technology. Technological improvements have lowered the production costs; printing equipment has required heavy capital investment from business communities and banks. In physical appearance, the quality of paper, print, and use of colorsand graphics have improved, and the quantity of newspaper pages has increased.

There is an intense fluctuation in the newspaper sector, with new titles continuing to appear, and relatively long established titles suffering readership losses. New types of print media began to appear, like free distribution daily newspapers. After the successful creation of *Metro* in Stockholm in 1995, the metropolitan city of Casablanca, launched its free daily newspaper *Au Fait* with a circulation exceeding 44,000 copies a day.

The last decade saw an explosive growth in the number of working journalists. By 2006, the number of male (1,952) and female (596) journalists holding press cards is estimated at 2,548.[58]

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57.   The Arab Press Network, "Morocco," available at http://www.arabpressnetwork.org/newspaysv2.php?id=117 (accessed 20 August 2010).

58.   Statistics on journalists available at http://www.mincom.gov.ma/MinCom/Ar/MenuGauche/الصحاف+انب/ (accessed 8 December 2010).

The press has not developed as a highly professional sector. The general quality of print media contents is poor in terms of writing, scope of coverage, and orientation to the readers' needs and wants. Inadequate education, lack of professional training, and a dearth of economic and technical resources have contributed substantially to the low quality of journalism. Specialization characterizes the booming magazine market. Major magazines target different audiences with specialized topics such as women, health, sport, business, and technology. Some weeklies use advanced color-printing technology and innovative editorial features.

The most important changes can be seen in the circulation figures of private newspapers and magazines. As the data in Table 5 shows, four out of the top five newspapers in 2010 were all private.

1.3.1.3 News Websites

As with other media sectors in Morocco, there is a lack of information about internet use. For the internet, the major source of information used in this study is Google Ad Planner.[59] Most Moroccan traditional media online portals reach smaller audiences than new entrants such as Menara.ma, Hespress.com, hibapress.com, lakome.com, goud.ma, Yabiladi.com, and Bladi.net. Table 6 represents information on websites with an internet audience reach of 1 percent or more, as estimated by Google for May 2010. It includes Moroccan and non-Moroccan traditional as well as web-only news and information stakeholders.

Table 6

Websites with an internet audience of 2 percent or more, May 2011

Website	Estimated unique visitors	Estimated reach %
Hespress.com	2,000,000	14.8
Hibapress	770,000	5.8
Menara.ma	510,000	3.9
Almassae.press.ma	470,000	3.6
Yabiladi.com	420,000	3.2
TV 2M	390,000	3.0
Bladi.net	350,000	2.7
Lakome.com	320,000	2.4

Source: Google Ad Planner, May 2011.

Internet portals that provide news, such as Google, Yahoo, and MSN, which reach high audiences internationally, have a very high reach and a regular audience in Morocco as well. For example, MSN and Live. com (belonging to Microsoft) reach 26.3 percent and 42.3 percent, respectively, of connected Moroccans; Yahoo.com and Yahoo.fr reach 17.9 percent and 7.6 percent of the audience. Nevertheless, it is not possible to determine how many of the users that have visited those websites have actually navigated through news and information sections.

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59. Google Ad Planner provides monthly estimates by combining sample user data from various Google products and services and from opt-in direct-measured site-centric data.

The most popular blog platforms are Skyrock.com (French blog platform) and Maktoob.com (an Arabic blog platform owned by Yahoo) with 12.3 percent and 10.2 percent reach, respectively.

Among news and information strands, sport is the most popular. Kooora.com (an Arabic website from outside Morocco) is particularly strong, being visited by as many as 12.4 percent of connected Moroccans. Also, it is the site where visitors spend most time, averaging 15.40 minutes per visit. Another indicator of the popularity of football-related news is also the top key word in the general search engine published by Google since 2008.[60] Football-related search terms take up a significant place: Real Madrid and Euro 2008 took four positions in 2008, while the only other clearly identifiable news item was Barack Obama. In 2009, Real Madrid and FC Barcelona were in the top 10 news searches, the Raja football team was among the most searched images, and Gaza as an international news item was also on the list. The year 2010 was still very good for Real Madrid, while Messi, the Argentinian football player, made it into the top 10in the image search.

1.3.2   Television News Programs

The most popular news programs in the country in terms of audience share are the news bulletins of Al Oula and 2M. Al Oula airs five news editions: three in Arabic (at 12.45, 20.30, and 23.00), one in the three dialects of Amazigh (14.00), and one in French (20.00). 2M airs four news editions, two in Arabic (12.45 and 23.30), one in Tamazight (14.00), and one in French (20.45). Digital migration in the form of the availability of online platforms for the two TV stations did not affect the audience share in any significant degree, given the high rate of illiteracy and the high cost and unavailability of internet for most households.

1.3.3   Impact of Digital Media on Good-quality News

Many Moroccan newspapers maintain websites. With the exception of *Asaabah*, whose online edition replicates the offline edition in the form of pdf files, the top five newspapers (*Al Massae, Assabah, Au Fait, Al Ahdath Al Maghribia, Le Matin du Sahara*) also offer alternative content in their online versions. The online versions include full transcripts of interviews, speeches, extensive tables and graphs, etc. Interaction levels are limited to contact through email and short opinion surveys. Some are experimenting with videonews and user comments. No newspaper has yet abandoned offline publishing to exist purely online.

Another contribution of digital media to the quality of news is the availability of reports, studies, investigations, opinion polls, and other news-generating sources. National and international organizations publish their reports and findings online and unlike in the past, when these reports were either unavailable or censored, they are now available online and journalists use them to generate news events. Reports on poverty, human rights violations, domestic violence, and many other themes are turned into news articles in independent newspapers or topics for debates on private radio.

Digital media also enhanced the speed by which information becomes available to news and information providers. This applies especially to international news. Moroccan news media, whether broadcasting or print,

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60.   Google Top 10 Searches in Morocco.

make use of online resources to receive updated information on current events. They would, for instance, use the articles, commentaries or press releases posted in Western media outlets to enrich their reporting on a current event. In the past, they would wait till the next day to see what was printed or aired about the issue. Now information updated on a regular basis on foreign countries' websites is used.

For a long period of time, reporting was the reserved monopolized domain of professional journalists. With the arrival of these instantaneous technologies, crowd-sourcing reporting has opened the gates of information in an unexpected way. With every new application, social media alter the notion of how Moroccans bear witness to political and social events.

Posting online videos on websites has contributed to the quality of news and information. The use of mobile cameras made many Moroccans deserve the label of mobile i-reporters. Internet users have made intensive use of YouTube to aggregate and collect user-generated reports of riots and police violence against students, labor unions, and other activists. The videos collect testimonies and user-generated facts. These grassroots journalists have on many occasions broken the news of many incidents to Moroccan mainstream media. A case in point that illustrates the contribution of digital media to the quality of reporting is a scandal that involved the Minister of Communication and the spokesperson of the government, Khalid Naciri. The minister was caught on tape while using his status as minister to release his son from police custody. The event was filmed by a mobile phone and posted on YouTube and other websites. The video reached 300,000 hits. Many newspapers reported this event in their hard copies and their websites with links to YouTube.

Many online newspapers offer videos to ridicule and mock public officials and government personalities during their speeches, especially during open sessions at the parliament. Other videos include podcasts that show unemployed university graduates protesting in front of government buildings and how the police force responded to them. A recent video on Hespress.com shows these protesters setting themselves on fire to protest against the lack of government reaction to their needs.

The internet has forced the print media to restructure the way they conduct business. One of the structural problems of Moroccan print media is the low rate of newspapers' and magazine's primary circulation and pass-along readership. In addition, the migration of readers, especially among urban youth, from offline to online media has contributed to this move. A number of print media institutions and organizations have begun to restructure and rationalize their portfolios.

In the web 2.0 age, broadcasters are repackaging media content, using new delivery systems and avenues to reach new customers by offering them more control of their media content. The two main TV and radio broadcasters, the SNRT and 2M, launched their new portal that acts as a one-stop shop for all government-owned TV and radio stations. The goal to offer digital forms for broadcast media content is to enable more Moroccans to have access to their contents. The portals are essentially new platforms, integrating state-of-the art technology for TV and radio groups. Browsers can stream live internet radio channels: 2M Radio, Al Idaa Watanya, Inter Channel, Al Idaa Amazighiya, Idaat Mohammed VI, etc. Private radio stations also maintain online portals and they use them as extensions to their aerial broadcasting.

It is important to reiterate that internet access and use are currently limited to urban areas and to educated urban segments of Morocco's population. Rural areas constitute 37.1 percent of the country and many have access to electricity and can therefore access television and radio, but most do not have access to phone lines and the internet. Accessing digital media requires digital media literacy, which most Moroccans do not have.

1.4   Assessments

Internet services provide the only digital interactive platform in Moroccan media space, where they are almost implemented in parallel with the newly launched private radio stations. However, the low income levels, high illiteracy rates, the complex language situation, lack of Arabic contents, and traditional media with limited financial capital and human resources to invest in cyberspace all contribute to a relatively slow development of local interactive services and contents.

Considering the lack of information about the number of users, it is difficult to conclude that interactivity in local contents is a factor of success. Youth and the educated elite, who represent the majority of the present audience, seem to follow world trends in interactivity, ignoring local services and contents considered tacky. They tend to use international state-of-the-art services: as anywhere else, Google, Facebook, YouTube, MSN chats, and Wikipedia have the highest reach among Moroccan users. Websites with relatively short, user-generated or user-distributed entertainment contents are the most popular. The content loses its own purpose and becomes a value in social interaction: videos, photos, and music are exchanged and create opportunities for socializing, but they are not activities that encourage informative and investigative vocations.

In more developed countries, private commercial radio stations have for many decades prepared listeners for the possibilities offered by rich interactive media: generations of radio show hosts have broadcast animating discussions about various subjects, some of which might be considered sensitive in Morocco, such as sexuality, religion, relationship issues, and politics. In addition, the tradition of radio shows educated the audience to participate and interact. The quality of the audience contributions and their engagement determine the popularity and the continuity of the service. The history of Moroccan media did not allow for such traditions to be installed. Television and radio remained under the government until 2002 when HACA was founded and a new audiovisual liberalization law was decreed. For many decades, TV and radio ignored the needs of the majority of Moroccans for news and information and were used as a propaganda tool in the hands of the government.

A recent study analyzing exchanges between users of 60Moroccan forums, blogs, and websites treating sensitive subjects such as religion, politics and homosexuality concluded that most of the subjects and spaces where the newly gained freedom of speech was practiced turned out to be unproductive for the lack of moderating and constructive input.[61]

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61.   S. Rahbaoui, "Moroccan Youth's Use of the Internet to Develop the Public Sphere," Senior Thesis Project in Communication, Al Akhawayn University, May 2010.

Internet access data and other data presented earlier indicate that the development of interactive digital media in Morocco is at its beginning. Things are changing rapidly and the questions and problems arising here are very different from the ones met in the developed countries. Connectivity is certainly one of the easiest points to be resolved. On the other hand, trained professionals and quality content production that will engage larger audiences and involve new generations in the interactive media sphere will remain long-term issues for Moroccan digital media.

Given their high rate of penetration, mobile phones could represent a better platform for the development of interactivity and superior user-engagement. Besides, with its multimedia contents, the mobile phone can offer easy alternatives for the illiterate population. Interactive mobile phone services are largely unexploited; 25.3 million users should represent an interest for private companies to develop sponsored and revenue-generating content.

2. Digital Media and Public or State-Administered Broadcasters

2.1 Public Service and State Institutions

2.1.1 Overview of Public Service Media; News and Current Affairs Output

The public service media are linked to the broadcast sector. There are two nationwide public service broadcasters, Al Oula and 2M. Under the 2004 Audiovisual Communication Law, these two TV channels are assigned a public service role; they must satisfy the general public's needs for information, education, and entertainment by providing a diversified and general program offer to appeal to the largest audiences possible. They are required to contribute to the socioeconomic and cultural development of the nation, notably by encouraging such development at the local and regional levels. The Licensing Obligations went even further to specify the need for the public service media to help citizens understand issues of importance to their lives so that they can make informed decisions and carry out their duties as effective citizens.

Public service broadcasting serves the public interest of the nation by providing programs that aim at educating, informing, and entertaining the public. The broadcasters must serve the general public and design programs that satisfy the needs of all ethnic and socioeconomic groups by providing programs in Arabic and Amazigh, and promote values of democracy, tolerance, modernity, and freedom. They must also promote Moroccan arts and culture. The programs have to be based on the Islamic, Arab, Amazigh, and Moroccan civilizations, as well as on universal human values. The programming has to promote the ideals of dialogue, national unity, and respect for individuals' thoughts and beliefs. The public service television and radio must broadcast the king's speeches and activities, debates and presentations in both chambers of parliament, and government press releases. They must also give political parties and labor unions equal access to airwaves, particularly during election campaigns.[60]

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62. 2004 Audiovisual Communication Law, art.46–49 on the public broadcasting system.

The programming of public service broadcasters must include news and newsmagazines of political and general information; TV magazines dealing with social issues; educational documentaries; religious programming; programming on practical advice; music, games, live music shows; fiction and films; children and youth programming; sports shows.[63] The Licensing Obligations require the TV stations to broadcast at least 10times a week, between 9 p.m. and midnight, programs devoted to people's everyday lives, such as health, civic education, consumption, domestic issues, education, training, and financial management.[64] The two channels must devote at least 10hours a week to programs for children.[65] Both channels are authorized to air advertising, but these breaks must be identified as such, separated from other programs, not exceed six minutes per each break and 14 minutes an hour. Children's programming cannot be interrupted by advertising.

In terms of news output, and as noted in *section 1.3.3*, Al Oula airs five news bulletins: three in Arabic (at 12.45, 8.30 p.m., and 11 p.m.), one in the three dialects of Amazigh (2 p.m.), and one in French (8 p.m.). 2M airs four news bulletins, two in Arabic (12.45 and 11.30 p.m.), one in Tamazight (2 p.m.), and one in French (8:45 p.m.). The other news programs of Al Oula and 2M consist of newsmagazines of 52 minutes, aired once a week.

A recent study on TV content produced by the two public channels between January 2007 and January 2008 found that Al Oula aired 11 current affairs shows and 2M aired 21.[66] The shows are locally produced and have different TV formats such as talk shows, newsmagazines, documentaries, game shows, reality-TV shows, debate shows, and practical advice shows. The shows dealt with public service-related themes, including politics, economy, culture, and education. They include all the shows that are broadcast during three main blocks, pre-prime time (7 to 8:30 p.m.), prime time (8:30 to 11 p.m.), and post-prime time (11 p.m. to midnight). Primetime brings the highest ratings and is therefore more significant in terms of audience exposure.[67]

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63. *Cahiers des Charges* (Licensing Obligations), available at http://www.haca.ma/op/operateurs/cc/Cahiers%20Charges%20SNRT%20VF.pdf (accessed 1 June 2010). (hereafter *Cahiers des Charges*).

64. *Cahiers des Charges*.

65. *Cahiers des Charges*.

66. B. Zaid, *Public Service Television Policy and National Development in Morocco: Contents, Production, and Audiences*, VDM Verlag, Saarbrücken, 2010 (hereafter Zaid, *Public Service Television Policy*).

67. More details on this study are in section *4.3.2*.

Table 7

Breakdown of TV shows: Al Oula

Program	Frequency	Length
Istehlekbla ma tehlek	Daily	5 min
Hiwar	Weekly	1h 30min
Moudawala	Weekly	52 min
100% Chabab	Weekly	52 min
OussarwaHouloul	Weekly	52 min
Kadamdahabi	Weekly	52 min
LallaLaârossa	Weekly	1h 30min
Tifaouin	bi-weekly	52 min
Macharif	bi-weekly	24 min
Echo Eco	bi-weekly	52 min
Macharia/ Entreprendre	Monthly	52 min

Source: B. Zaid, *Public Service Television Policy and National Development in Morocco: Contents, Production, and Audiences*, VDM Verlag, Saarbrücken,2010 (hereafter Zaid, *Public Service Television Policy*.

Table 8

Breakdown of TV shows: 2M

TV Show	Frequency	Length
Sihatouka Koula Yawm	Daily	10 min
Majallat Al Barlamane	Weekly	24 min
Rihanat Moujtamaa	Weekly	24 min
Tiyarat	Weekly	24 min
Challengers	Weekly	1h 30min
Challenger Innovation	Weekly	1h 30min
Macharif	Weekly	24 min
Islam Souloukwa Mouamalat	Weekly	24 min
Generation	Weekly	52 min
Abwab El Medina	Weekly	52 min
Diwan	Weekly	52 min
Eclairage	bi-weekly	52 min
Marocains du Monde	bi-weekly	52 min
Moubacharat Maakoum	bi-weekly	1h 30min
Maroc en Mouvement	Monthly	52 min
Moukhtafoun	Monthly	52 min
Grand Angle	Monthly	52 min
Entre les Lignes	Monthly	52 min
Tahqiq	Monthly	52 min
Toubkal	Monthly	52 min

Source: B. Zaid, *Public Service Television Policy*.

The study found that Moroccan public service television is in clear violation of its public broadcasting mandate, that is, to serve all segments of society. By using elite languages, modern standard Arabic and French, Al Oula and 2M exclude most segments of society except the male, urban, wealthy, and highly educated classes. (The results of this analysis are discussed in more detail in *section 4.3.2.*)

2.1.2 Digitization and Services

Morocco has witnessed the development of new platforms and avenues to communicate public service broadcast content in digital format, but full digital switchover is far from being implemented. The public service mandate, as outlined in the 2004 audiovisual law and the Licensing Obligations Documents of the SNRT and Soread 2M, has not been affected by the creation of these new digital platforms. Digital and analog audiences receive the same contents.

In March 2007, the Ministry of Communication introduced the Digital Terrestrial TV DTT (*Television Numerique Terrestre*, TNT) to transmit the two public service stations in a digital format. On 19 May 2006, Maroc Telecom obtained the authorization of HACA to broadcast programs of the national television stations and many international channels via ADSL. Besides Al Oula and 2M, audiences can watch other national and international programs without antenna or satellite dishes.[68]

With the arrival and rapid adoption of mobile phones, the potential impact of this digital device on mainstream mass media platforms has become evident. The high mobile penetration of 27 million mobile phone subscribers means that this digital device has the potential to become the preferred platform for consuming media and entertainment. In 2008, SNRT launched a free mobile TV based on Nokia DVB-H standard, the EU standard for mobile TV. The service initially covered the two big cities of Casablanca and Rabat. By the end of 2009, the service had been extended to the 20 biggest urban centers. The delivery of media content via mobile platforms is not yet popular, however. SNRT's offer of a full "freemium" business model (without paying any subsequent fee for premium content) has not attracted Moroccans to use this mobile media-rich application. The very high penetration of mobiles has not yet produced a massive change in media consumption.

2.1.3 Government Support

Government support for the partial digitization of public service media is explicit. All the above mentioned initiatives to provide digital avenues for media contents have given priority to Al Oula and 2M Soread. For DTT, the government spent US$12 million to subsidize the cost of receivers for households.[69]

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68. With TV over ADSL, Maroc Telecom offers three varied TV packages. The first package costs US$6 a month and offers all Moroccan channels, Al Jazeera, LBC, TVE International, CNBC Arabia, Al Jazeera Children, TF1, France 2, France 3, France 5, TV5, and LCI. The second "discovery" package costs US$10 a month and offers in addition to the offer in package one, ART Teenz, ART Hikayat, Art Tarab, ART Sport, ART Sport 1, and 2, and CNN. The third premium package costs US$14 a month and offers ART Sport 3, ART Sport 4, FoxLife, ART Aflam 1, ART Aflam 2, Rotana Cinema, TCM Movie and Trace TV, MTV, Rotana Clip, Travel, National Geographic Channel, Planet and Cartoon Network, Space Toon, Nickelodeon and Game One.

69. SNRT, *Television Numerique Terrestre*, TNT, available online at http://www.snrt.ma/tnt.php (accessed 10 June 2010).

Public service media have traditionally been given exclusive coverage of political news and events. Al Oula has unlimited access to the coverage of royal activities, and every time an event involves the presence of government officials, Al Oula and 2M presence is routine. This says a great deal about the motivations behind the government subsidy.

2.1.4 Public Service Media and Digital Switch-over

Digitization has a major impact on the development of websites. It does not have an impact on the increase of specialized channels. Al Oula and 2M portals are essentially new platforms, integrating state-of-the art technology for these TV and radio networks. Browsers can stream live internet TV and radio channels belonging to SNRT: Al Oula, 2M, Arriyadia (sports), Arrabia (education and culture), Assadissa (religion), Al Maghribiya, Al Idaa Watanya, Inter Channel, Al Idaa Amazighiya, and Idaat Mohammed VI. These portals allow nationally produced television contents to be available for worldwide audiences.

2.2 Public Service Provision

2.2.1 Perception of Public Service Media

Public service provisions must be understood within larger social and political developments since 1999. The INDH remains the most important long-term development project undertaken under the reign of Mohammed VI. The initiative aims at mobilizing the country's institutional and financial resources (national and international) to improve the population's living conditions and the national social indicators. The INDH aims to boost income-generating activities, improve infrastructure and social services (such as education, literacy, and healthcare), and provide assistance to the most vulnerable groups (women, youth, and the poor). The Moroccan government gave important policy considerations to regulate the use of television and radio airwaves as important outside sources for promoting its development goals. It pledged to reform the state broadcast system, turn it into a public service broadcasting system, and relieve it from the control of the Ministry of Communication. Consequently, the structure of the broadcast media was redefined, an independent regulator was set up, the public service broadcasting was reformed, and a framework for private broadcasting was provided.

However, the government still interferes with the content of the media in ways that do not serve the country's democratic transition and its image abroad. Today, the public service provision is looked at with suspicion by politicians, the public and journalists alike. Regardless of the new media policies, there are features of the old regime that re-emerge unexpectedly as their cultural and institutional foundations turn out to be more resilient. These old practices are manifested in the quality of news contents of the broadcast media outlets, especially those traditionally run and controlled by the government. Al Oula's news coverage offers two appropriate examples. On the same day that London was hit by a terrorist attack on 7 July 2005, the Prince of Qatar visited Morocco. The Al Oula news bulletin featured as its top story the King's dinner reception to honor his guest. The bulletin featured the coverage of the Prince's arrival at the airport and his meeting with the King. The coverage entailed even the ceremonial listening to Moroccan and Qatari national anthems.

This took 30 minutes. After that came the letter the King wrote to the Queen of England to express his condolences, and only after that did the station provide coverage of the attack. In case one misses the news in French, the Arabic version which airs immediately after the French, repeats the full news story including the ceremonial listening to the national anthems.

On the morning of Saturday, 26 April 2008, a fire broke out in a mattress factory in Issassfa, a suburban neighborhood in Casablanca, killing 55 workers and injuring a dozen others. Al Oula reported on the story in the main prime-time evening news at 8 p.m. only after reporting on the royal activities. The king presided over a ceremony of a signature agreement, had a meeting with his aunt Princess Lalla Amina to congratulate her on becoming a member of the Advisory Board for the International Special Olympics committee, and finally met with the local authorities of the city of Meknes to discuss the city's rehabilitation programs. The last King-related story was about his condolences to the fire victims and his instructions to the authorities to investigate the causes of the tragedy. These stories took 24 minutes. The 10-minute coverage of the fire consisted of a description of what happened, using testimonies from witnesses, fire fighters, and survivors. Most of the coverage addressed the causes of the tragedy and the heroic role of the fire fighters. The coverage also included the visit of the Minister of Interior to the scene.

Both the private press and the political party press severely criticized this coverage of what they called a national tragedy and by so doing challenged the "sanctity" of royal engagements. They expressed the humiliation the average Moroccans felt when they saw their public television give priority to protocol activities over human tragedy.

The legal, economic, and political environments are certainly more open and conducive to more freedom than they were during what human rights activists called the "years of lead". There is still more work to be done on the quality of news contents and the organizational culture in formerly government-run media institutions. Government-run television seems to be stuck in the old regime, and it seems that resistance to freedom and democracy emanates both from within the media institutions and from without. The "holiness" of royal activities and the amount of air time they occupy in both public service channels, particularly Al Oula, has been a source of suspicion and discontent.

2.2.2   Public Service Provision in Commercial Media

No specific public service obligations are imposed on commercial media. When a license is granted to a TV or radio station, the station signs a Licensing Obligations Document that lays out the nature and scope of its services. The station can choose to include some public service provisions, but none are imposed. However, commercial media must abide by the general philosophy and recommendations in the 2004 audiovisual law whose preamble states that the general philosophy of this law is founded on the kingdom's constitutional principles of Islam, monarchy, and national unity. It is also founded on universal human rights. This law aims at consolidating the nation's option for democratic reforms, the rule of law, pluralism, and freedom of expression and opinion. In the preamble, the notion of responsibility is emphasized, that freedom is to be exercised within the limits of responsibility. Some of the objectives of this law are summarized as follows: to reinforce freedom of expression and opinion; to promote democratic ideals and the respect of human

rights and pluralism; to contribute to the socioeconomic and cultural development of the nation; to enhance audiovisual communication production; to encourage national production and to preserve the national cultural heritage.

Audiovisual communication is "free" and this freedom is exercised while respecting the dignity, liberty, and property of other human beings.[70] It is also a freedom that is exercised while respecting diversity of opinions, the country's religious values, public order, and national security. All broadcasting companies reserve the right to create their programs freely, as long they respect pluralism and the diversity of viewpoints. In other words, any given station cannot be the mouthpiece of any particular ideological position.[71] Broadcasters must promote Moroccan arts and culture, encourage local production, and provide an objective and balanced coverage of news events, while not taking sides with any political party, ideology or doctrine. Programs must also be appealing to all regions of the country and must respond to the audiences' needs. Broadcasting companies must also respect intellectual property and copyrights.[72]

The law obliges all TV and radio programs not to question Islam, the monarchy, and Morocco's territorial integrity (southern Sahara province).[73] They must preserve neutrality and not serve the interests of a political party, an ideology, an ethnicity, or particular economic or financial interests. They also must not incite people to violence or terrorism, or express racist and discriminatory rhetoric towards an ethnic group, nation, race or religion.[74]

2.3   Assessments

The partial digital switch-over allowed public service media to create new digital platforms to repackage their contents. In terms of gains, Al Oula and 2M launched new online portals that act as one-stop shops for all government-owned television and radio stations. The goal to offer digital forms for broadcast media content is to enable more Moroccans at home and abroad to have access. New platforms and avenues were also developed in order to communicate broadcast content DTT and Maroc Telecom's TV via ADSL.

In terms of losses, the population that has benefited from this partial digital switch-over is still very small. Personal computers and internet access are beyond the purchasing power of most Moroccans. The digital divide is widening, and those to whom digital content is least available are being left behind. Portions of the population with easy access to the internet can benefit from these developments and they have the language skills that allow them access other sources of news and entertainment provided by more professional and

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70. 2004 Audiovisual Law, art. 3.

71. 2004 Audiovisual Law, art. 4.

72. 2004 Audiovisual Law, art. 8.

73. For background information on the southern or western Sahara conflict, see the report by Human Rights Watch on "Human Rights in Western Sahara and in the Tindouf Refugee Camps" (2008), available at http://www.hrw.org/en/node/77259/section/7 (accessed 21 February 2011).

74. 2004 Audiovisual Law, art. 9.

highly attractive Western online media. Those with the least available access to digital contents continue to rely on satellite TV and to seek alternative sources of information from Arab TV satellite channels.

The public service mandate as outlined in the 2004 Audiovisual Communication Law and the Licensing Obligations of Al Oula and 2M has not been affected by the creation of these new digital platforms. Audiences receive the same contents found in analog broadcasting via these new digital formats.

The history of public service provisions in Morocco is still very recent. It only dates back to 2004 when the first audiovisual law was adopted. It is too soon to answer the question of whether these provisions have lost policy significance. There have been many developments in regulating the existing analog public service broadcasters and creating new digital platforms for content delivery.

3. Digital Media and Society

3.1 User-Generated Content (UGC)

3.1.1 Overview

In 2009,[75] the number of subscribers to the internet reached 1.2 million, 4.51 percent of the population. Of these users, 54 percent use 3G, more than 566,000 customers, 1.8 percent of the population. The most popular types of UGC are social networking, video sharing websites, wikis, and blogs. There are no official statistics that would confirm these tendencies. However, according to Alexa.com, the top 10most visited websites in Morocco are Google.co.ma, Facebook, YouTube, Windowslive, Google.com, Google.fr, Yahoo, MSN, Kooora.com, and Wikipedia.[76] Facebook and YouTube are widely popular.

It is important to note that Kooora.com, the only Arabic site in this list, is not a news and information site; it specializes in sport, football above all. Major world UGC sites are reaching the great majority of users, especially the younger ones: rival UGC platforms that are popular in other developed and developing economies (e.g. Hi5, Orkut, AIM, Yahoo Messenger, MySpace), as well as services popular in the rest of the Arab world (e.g. Jeeran, Netlog, Arabfrienz, Muntadyat), are infrequently used in Morocco. Facebook launched its Arabic version in 2009, in order to build its marketing presence. With an estimated 3 million users today, Morocco has the third largest Facebook community in the Arab world after Egypt and Saudi Arabia.

The blogosphere has grown exponentially. According to Google Ad Planner, the most used blog platforms in Morocco are Skyrock.com (French blog platform) and Maktoob.com (the largest Arab online community with the most famous email service as well as bilingual Arabic and English blog platform, owned by Yahoo) with 12.3 percent and 10.2 percent reach. Reliable data about the Moroccan blogosphere are still lacking. The number of active bloggers has been estimated at 30,000.

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75. ANRT, *Tableau de bord du marché Internet Décembre 2009*.

76. See http://www.alexa.com/topsites/countries/MA (accessed 2 June 2010).

Hespress.com, the first online newspaper, launched in 2007, is one of the best examples of citizen media in Morocco. A collaborative online newspaper, it is widely read and has more than 100,000 readers per day, of whom more than 60 percent live in Morocco.

There are no statistics on the number of UGC website users. There are 1.2 million internet subscribers.

Table 6 presents information on the Moroccan internet audience, estimated by Google Ad Planner for the month of May 2011. It covers both UGC and non-UGC Moroccan and non-Moroccan websites. None of the 10 top websites in Morocco by audience is a purely UGC website.

3.1.2 Social Networks

According to Alexa.com and Google Ad Planner, Facebook is the most popular and active social network, far ahead of any other international network, while national and local social network services are still nonexistent. There are reportedly 840,000 Facebook subscribers now.[77] MSN chat services are also hugely popular, but no statistics or usage patterns are available at the moment.

3.1.3 News in Social Media

Internet portals including news and information providers such as Google, Yahoo!, and MSN have very high reach and regular audience. Blogs are quite popular as well. However, it seems that news and information sections are less popular than sports and entertainment. Most searched terms since 2008 involve downloads, games, YouTube, MSN, video, music, and football. Most searched images include terms such as love, girl, photo, woman, image, and games. Information and news terms are almost absent from this list.[78] Sports news and information have a bigger success with the Moroccan audience than any other topic. Kooora.com website (located outside Morocco) is particularly visited by as much as 12.4 percent of connected Moroccans. Also, it is the website that visitors spend the most time on, with an average of 15.40 minutes per visit.

3.2 Digital Activism

3.2.1 Digital Platforms and Civil Society Activism

The internet is now the communication platform preferred by Moroccan youth. Forums, blogs, wikis, and YouTube videos are in vogue. Young people started to generate their own media contents, practicing new kinds of journalism and becoming citizen journalists. Also, dissidents and activists are capitalizing on these new digital media because of their low entry barriers. Civil society groups and new social movements, including feminism and Islamism, are using social media to inform, mobilize, campaign, recruit, and build coalitions.

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77. R. Jankari, "Morocco catches Twitter and Facebook fever," 24 July 2009, available at http://www.magharebia.com/cocoon/awi/xhtml1/en_GB/features/awi/features/2009/07/24/feature-01 (accessed 11 August 2010).

78. Google Top 10 Searches in Morocco.

Social media are increasingly crucial for political conflict and political activism. However, the overall impact of these developments is not very significant, considering the small audience share that the internet has and the low level of political engagement in Morocco.

Social media triggered a revival of the watchdog function of the media and paved the way for it to act as a fourth estate in monitoring political abuses by the regime. In summer 2008, *an* amateur cameraman filmed traffic police taking bribes from drivers. The so-called Targuist Sniper video *was uploaded on* the video-sharing site *YouTube, where it was widely viewed. T*his led to a police investigation and the subsequent arrest of the police officers involved. This episode raised cyber-activism against routine corruption to a new level, setting an example that was followed in other cities. Despite the fact that the "YouTubization" of corruption resulted in the arrest of further police officers, its overall impact remained short-term and limited; there were a few such episodes within a short period of time and nothing else later.

The government does not tolerate all online activities. Fouad Mourtada, a young engineer and online user, was sentenced to jail for allegedly stealing the identity of Prince Moulay Rachid, the king's younger brother, on Facebook. The alleged impostor was sentenced to three years in prison and a fine of US$1,350 for allegedly showing disrespect to the royal family. Some bloggers in Morocco and elsewhere stopped writing in protest. Facebook denied any involvement in this case. After one month in custody, Mourtada was released by royal pardon.

In September 2008, Mohammed Erraji was arrested for posting an entry on his blog that criticized King Mohammed VI's charitable habits towards Moroccans as a source of cultural laziness and fatalism. He was given a two-year prison sentence and fined US$630. This provoked protests from internet users around the world and marred Morocco's international image. Like Mourtada, Erraji was released by royal pardon.

In 2009, Hassan Barhoun, a journalist and blogger, was sentenced to six months in prison and a US$600 fine for publishing a memo signed by 60 political and human rights activists and intellectuals. He was known for his investigative reporting and for condemning corruption in Morocco. He also led a press initiative entitled "Journalists Without Limits" on YouTube.

These disproportionate sentences shocked the Moroccan blogger community, which is one of the biggest in the North African region, and pushed many popular bloggers to stop writing for fear of the government, which monitors cyber-activists closely, since the internet has created a dynamic and networked public space where lively debates can take place on many issues still considered offlimits to mainstream media. Since the rise of the social media to relative prominence, government reactions to these new technologies reflect the political culture of oppressing freedom of speech. The government has not yet learned how to deal with bloggers in a democratic way.

Yet, unlike many developing countries, Morocco has rarely if ever blocked access to YouTube, although the website contains many videos that harshly defy the three national taboo subjects, namely, the monarchy,

Islam, and Western Sahara. For instance, YouTube carries more than a dozen videos targeting the King and the royal family, accusing them of corruption, immorality, and even sexual deviance.[79]

According to the Open Net initiative (ONI),[80] internet access in Morocco is, "for the most part, open and unrestricted." ONI testing shows that Morocco no longer blocks a majority of websites that support the independence of Western Sahara, which is one of those three taboo subjects. The report states, however, that Morocco occasionally blocks access to a small number of blogging platforms and anonymizers. The filtration regime is not comprehensive, which means that access to similar content can be found on other sites. There are, however, cases of prosecution of internet users and bloggers because of their writing and online activities.

E-journalists, bloggers, and e-writers are organizing themselves to advocate for their rights and freedoms under the umbrella of the National Moroccan E-press Syndicate.

3.2.2   The Importance of Digital Mobilizations

Given the rate of illiteracy, poor-quality content, and the high cost of internet for most households, only a small minority of internet users are directly interested in such digital mobilization. Mainstream society is only affected when such issues are reported on television, radio, newspapers, and magazines. Since television is government-controlled, much of this information is omitted. Private radio stations do cover such events, but the general distrust Moroccans have of political life makes such mobilization less relevant. In the 2007 elections, voter turnout was 37 percent, the lowest in Morocco's history.

3.3   Assessments

The contribution of these new media to the news and information offer is substantial, but the impact on the average Moroccan remains minimal. News updates, audio and video streaming, availability of images, and i-reporting are all new valuable sources of information that Moroccan online portals use to enrich their news and information output. Internet users use these as an alternative to traditional sources of news, but only a small segment of urban educated Moroccans benefit from them. Internet users demonstrated intensive use of YouTube to aggregate and collect user-generated reports of riots and regime violence against students, labor unions, and other activists. The videos collect testimonies and user-generated facts. Many online newspapers post videos to ridicule and mock public officials and government personalities during their speeches, especially during open sessions at the parliament. Other videos also include podcasts that show unemployed university graduates protesting in front of government buildings and how the police responded with force. A recent video on Hespress.com shows these protesters setting themselves on fire to protest against the lack

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79. RSF reported one incident where YouTube was blocked. Morocco's major ISP, Maroc Telecom, blocked access to YouTube on 25 May 2007 for a few days. Maroc Telecom reportedly said that it was a "technical problem." Other Moroccan users of the other two ISPs, Medi Telecom and Wana, continued having access to YouTube. RSF speculated that Maroc Telecom may have blocked access to YouTube after videos "were posted on it of pro-independence Saharan demonstrations."

80. Open Net Initiative, "Internet Filtering in Morocco, 2009," available at http://opennet.net/sites/opennet.net/files/ONI_Morocco_2009.pdf (accessed 10 June 2010) (hereafter Open Net Initiative, "Internet Filtering in Morocco").

of government response to their needs. Social media and UGC websites made the availability of these new sources of information possible.

A minority of citizens are taking the new media opportunities for civil and political activism. The internet has created a dynamic and networked public space where support and solidarity can be expressed concerning each case of imprisonment of journalists or censorship of the press online and offline. Large numbers of internet users can unite, compile, and share electronic materials (videos, photos, posters, banners) about each imprisonment or censorship case. The government is very aware of the power of this medium and knows well the reach it has especially among Western audiences and the impact it has on international public opinion and on Western human rights organizations in particular.

However, the government monitors cyber-activists closely, and the use of the 2002 Press Code to sanction and oppress freedom of expression is an indication that the government is committed to prevent this space from becoming a nucleus for new progressive political discourse.[81] The 2002 Press Code maintains prison sentences and heavy fines for anybody who publishes information deemed by the government to be provocative in any manner, shape or form. This can cause many cyber-activists to practice self-censorship.

The lack of trained professional online forum moderators limits the quality and quantity of debates that can generate ideas for digital activism. In 2009, there were a few instances of digital activism but their impact was very minimal. The Alternative Movement for Individual Liberties (*Mouvement Alternatif pour les Libertés Individuelles*,MALI) is a human rights association that started as a Facebook group. During the month of Ramadan in 2009, it organized a collective and public fast-breaking action to call for greater freedom of religion. It is illegal to eat during the day in public in Ramadan, a holy month of fasting in Morocco and the Islamic world. On the day of the demonstration, more police showed up than activists. There were reportedly as few as four activists and they were all arrested and later released. What MALI accomplished was sparking a debate in the media about individual freedoms in Morocco that lasted for a few weeks.

Another group, the "All against the Prime Minister's family" Movement, also started as a Facebook group with 20,000 members. The purpose of this group is to denounce the overwhelming presence of one family in the current government, controlling many government ministries and budgets. The group planned a sit-in in front of parliament, but the action was cancelled.

These two examples show that digital activism is in its infancy. Unless it is backed by a strong political movement, it will remain a limited space where activists can express dissent and denounce the government's oppression of journalists and freedom of expression. So far, digital activism has not translated into concrete actions on the ground.

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81.   The prosecutions of Fouad Mourtada, Mohamed Erraji, and Hassan Barhoun (discussed in section *3.2.1*) were carried out using the Press Code.

The blogosphere is very dynamic, but personal life issues are the most dominant and preferred issues. The majority of bloggers focus on personal and lifestyle issues, making the blogosphere less political. Nevertheless, in recent times, many university graduates have gathered on a regular basis in front of the parliament in Rabat to protest the government's indifference to high unemployment; and these activists make use of blogs to report on their struggle. These bloggers are not necessarily interested in internal political change; they use their blogs to denounce police brutality. They write in Arabic, French and even in Moroccan dialects.

The growth of blogs and forums means that anyone with an internet connection can take part in forming public opinion. It is clear that the internet will not necessarily provide professional-quality journalism, but it will offer browsers on-the-spot access to events. There is no audience measurement of internet users, but the exponential adoption of internet use and the continuing increase of broadband internet have the potential to become a household standard in Morocco. In the future, the internet is very likely to become a substitute for television and radio among young Moroccans. With its simple delivery of video content, the internet is expected to dominate the visual culture, supported by video sharing that will play a part in the redefinition of viewing options. The seemingly infinite popularity of YouTube and similar video-sharing sites has helped news videos to mushroom on the video-sharing websites. Bloggers have a tendency to view and share politically oriented YouTube videos. As with content sharing, Moroccans are keen in remixing online content: taking materials they find online such as songs, text or images and remixing it into their own creations. Teenagers share self-created content online, such as photos, videos, artwork or stories. This online sharing is now widely popular among internet users.

One attempt to train activists to use online media is the Sanad initiative.[82] In 2009, in cooperation with the United States Agency for International Development (USAID), Tanmia, a Moroccan non-governmental organization (NGO), launched this initiative to train 60 activists to use internet-based tools such as e-advocacy and cyber-activism. The goal of this training program is to empower these cyber-activists by teaching them how to use internet search techniques, Voice over Internet Protocol (VoIP), and social networking websites. Trainees under 35 years learned how to use techniques of online writing and publishing, including blogs, podcasts, and e-journalism.

Trainees were taught how to practice e-advocacy and e-mobilization of people and opinion. The trainees became familiar with the effective and efficient strategies of e-advocacy, e-activism, and citizen cyber-activism. They also learned how to monitor and investigate and how to evade online censorship. USAID's decision to extend the training program for a further three years is an indication of the need for and the importance of such initiatives in empowering and engaging civil society groups to use digital activism.

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82. Tanmia.ma, "L'USAID lance officiellement le Projet SANAD d'appui à la société civile et au dialogue public" (USAID officially launches the SANAD Project for the support of civil society and public dialogue), 21 November 2009, available at http://www.tanmia.ma/article.php3?id_article=22305&var_recherche=sanad (accessed 14 June 2010).

4. Digital Media and Journalism

4.1 Impact on Journalists and Newsrooms

4.1.1 Journalists

The main changes in the work of journalists are triggered by the developments described in *section 1.4.2*. These factors are not necessarily digitization-related. The new liberalization of the audiovisual sector, the rise of private print media, and the new political environment in which journalists function all served to change the work of journalists. From Morocco's independence in 1956 until 1999, broadcasting was government-controlled and the printed press was mainly controlled by the political parties. Far from giving their viewers and readers factual and unbiased news reporting, Moroccan media used to provide a steady flow of editorialized news, in favor of either the government or the political parties. After 1999, a new political environment paved the way for the rise in the number of private radio stations and print outlets that opened new spaces where journalists are not tied to the strict and highly politicized editorial policies of their employers. The new political era in Moroccan journalism calls for professionalism and the creation of a code of ethics. The potential impact of digitization on journalists' work is at this point very minimal.

With the exception of those who work for government-owned TV and radio stations and the Maghreb Arab Press (MAP),[83] few journalists have employment contracts, health insurance or retirement benefits. Full-time journalists have access to computers and the internet in their offices. Correspondents either buy their own computers and digital cameras, and pay for internet access from their own pockets, or rely on cybercafés to send their articles and other electronic materials such as photos and videos. They are usually not paid on a regular basis, and work under strict deadlines.

With regard to online journalism, according to Abdallah Saoura,[84] co-founder of the National Moroccan E-press Syndicate, one of the main challenges facingonline journalists is the lack of a legal framework. Online

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83. Maghreb Arab Press is Morocco's official news agency.

84. N. Cherkaoui, "Online journalists plan new labour union in Morocco," Magharebia.com, 10 February 2009, available athttp://magharebia. com/cocoon/awi/xhtml1/en_GB/features/awi/features/2009/02/10/feature-03 (accessed 1 June 2010).

journalists lack the necessary credentials and are not considered to be professional journalists. In 2006, the Ministry of Communication issued 778 journalists' cards for the press and 499 for SNRT television journalists, compared with only 24 for online journalists.[85] As a result, the state authorities do not allow them access to information because they lack the status of journalists.

Access to information is a major problem. National government institutions such as ministries keep open relations with the media, with access to information granted exclusively to government-controlled TV and radio stations and the press. Government institutions at the local level, that is, governors' offices and city mayors' offices, rarely communicate their activities to the media. When they do so, it is mostly in the form of invitations to attend a particular event; they rarely send a press release or provide a press dossier. When journalists request additional information, it is usually accessed with much difficulty. Citizens are most of the time kept in the dark about what is happening in their communities because local government institutions refuse to share information.

A national debate took place in 2006 involving the Ministry, the National Union for the Moroccan Press (*Syndicat national de la presse marocaine*), and the Moroccan Federation of Newspaper Publishers (*Fédération marocaine des éditeurs de journaux)*. One of the main goals of the debate was to improve the working conditions of journalists, by regulating the profession in terms of making contracts obligatory, and providing health insurance and retirement benefits. This project also aimed to create a code of ethics and revise the 2002 Press Code, in particular to reduce or eliminate prison terms for journalists.[86] The report anticipated that the new legal framework for the profession and the new Press Code would be approved and adopted during 2007. These reforms have still not taken place.

Email is the most important digital tool used by journalists.[87] It helps them send their articles and photos in real time and they also get immediate feedback from their editors. Articles are published a lot faster than in the past. The internet is used to collect additional information on the events to be covered, especially in instances when the invitation does not include a press release or a press dossier. Many interviewees expressed skepticism about the reliability of online information. They are concerned about whether information is up-to-date and whether the source is trustworthy. They also said that journalists must be in the field rather than behind a computer.

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85. Ministry of Communication, *Rapport annuel sur l'état de la presse écrite et la communication audiovisuelle publique 2006* (Annual report on the state of the printed press and public audiovisual communication 2006), available at http://www.mincom.gov.ma/NR/rdonlyres/319E32BD-570D-4490-834D-319FB5344BE5/0/RapportdelapresseVF2006.pdf (accessed 15 May 2010) (hereafter Ministry of Communication, *Rapport annuel 2006*).

86. Ministry of Communication, *Rapport annuel 2006*.

87. Interviews with Mohamed Drihem, correspondent of *Le Matin du Sahara* newspaper, 17 June 2010; Abdessalam Ismaili, correspondent of *Al Bayan* newspaper, 17 June 2010; Souad Zaitraoui, 2M reporter, 18 June 2009; Madame Zakia, program director of Hit Radio, 18 June 2010.

4.1.2 Ethics

Reporting unverified information, relying on a few unnamed sources, and presenting opinions as facts are all routine in Moroccan journalism. The interviews conducted for this report all point to the lack of adequate training and working conditions. The majority of journalists do not have training in journalism. They are writers with an education in literary studies. Rachid Nini, editor-in-chief of *Al Massae* (see *section 1.3.1*), has a degree in Arabic literature. He was not trained to be a professional journalist.

Journalists are also not given the necessary support to conduct their work properly. They work under strict deadlines and with lack of financial support; they tend to collect information from the easiest sources. It is very customary not to refer to sources with names and positions. Some commonly used phrases are: "according to trusted sources," "based on the testimony of an official," or "according to experts." Names of sources, officials or experts are never mentioned. It is also customary to publish news releases from MAP or other news agencies without mentioning the source.

One story cited by Mohammed Drihem of *Le Matin du Sahara* was a recent event in the small town of Ifrane. A member of the auxiliary forces shot and killed two commanders in his unit after a dispute with senior officers. Drihem and three other newspaper journalists (correspondents of *Al Bayan*, *Al Mounataf*, and *Al Alam*) were the only journalists on the spot and filed stories for their respective newspapers. The following day, more than a dozen newspapers reported on the same event, including details that could not have been available at the time. The newspapers published details about the dispute, assigned guilt, and speculated on the reasons behind such a tragedy. Drihem said that the police had not yet finished their investigation and no other official report on the event was released. The newspapers published their articles based on sources and information collected by phone or through the internet.

The impact of the internet on journalists' ethics has so far been negative. Data theft and plagiarism have increased. Based on the interviews for this report, online journalists tend to copy articles from print newspapers without citing the sources. They also tend not to check the validity or reliability of their information gathered during their research.

4.2   Investigative Journalism

4.2.1   Opportunities

The interviews conducted for this report indicate a growing interest in investigative reporting among both journalists and the public. With the rise of a private press, especially magazines, there is more investigative reporting today than in the past. There has also been a remarkable increase in investigative reporting by Al Oula and 2M television channels. In the past two years, investigative journalism by the state-owned media became more focused on societal and cultural issues, and steered away from political ones.

Economics journalism has benefited tremendously from digitization. Annual reports posted online by financial institutions and major companies have become principal sources for journalists. Reports on

important mergers, investments by telecoms companies, and changes in leadership of major companies are some of the areas addressed by private magazines.

Investigative reports on international news are prepared almost exclusively from international online sources, given the lack of financial means to maintain a network of correspondents around the globe. For national politics, government institutions, and to a lesser extent local authorities, do not keep viable online resources.

4.2.2 Threats

Although government censorship is a recurring feature of Moroccan journalism, its impact is less important than self-censorship. Journalists avoid the three taboo areas of the monarchy, Islam and territorial integrity (southern Sahara provinces). The number of press titles has increased, an indication of a higher degree of pluralism, and the liberalization of broadcasting has given way to new audiovisual content providers. However, in the first seven months of 2009, the government favored the use of financial penalties instead of prison terms to keep the most outspoken journalists in line. Excessive fines led to the shutting down of *Le Journal Hebdomadaire*, one of the most courageous magazines, which had come to symbolize the opening-up that began under the reign of Mohammed VI.

The government tolerates mild criticism but does not allow anyone to cross the lines known to all: Islam, the monarchy, and Western Sahara. The RSF report also cites Driss Chahtane, editor of *Al Michaal* newspaper, sentenced to one year in prison in October 2009. The report stated that the authorities also ban foreign publications deemed "disrespectful". *Le Monde* was banned on 4 August 2009 because it carried an opinion poll on Mohammed VI's 10-year reign. *Telquel* and *Nichane*, two Moroccan magazines, were the initiators of this opinion poll but they were denied authorization to publish the results.

4.2.3 New Platforms

The amount of investigative journalism done through blogs is insignificant. Most articles consist of opinion pieces or excerpts from other news sources. The Moroccan blogosphere is very dynamic, but not very political. Besides, there is the problem of online journalists lacking the necessary credentials to obtain access to official information.

4.2.4 Dissemination and Impact

While digitization has improved the dissemination of investigative journalism, the high rate of illiteracy and the lack of access to digital media mean that digitization has not helped improve its impact, at least internally. With online portals and the ease with which information moves online, investigative reporting is reaching more people, and the amount of information (videos, interview transcripts, etc.) that can be included in the online portals is much more substantial. In terms of wider impact, digitization has allowed international observers, human rights organizations, and other international activists to be more aware of what goes on in Morocco, and respond in a timely manner.

4.3 Social and Cultural Diversity

4.3.1 Sensitive Issues

The most sensitive issues in terms of social and cultural diversity concern language, ethnicity, and gender. Other issues exist, involving sexual, religious, and migrant communities, but they have not been addressed in any significant manner in the media to make them sensitive enough to attract the attention of policymakers or even media professionals.

Moroccans speak Darija, a dialect of Arabic, in everyday life. Darija is an oral language, not used in writing. The official languages are modern standard Arabic and French. However, both public service television stations and all printed media (with the exception of one magazine and a couple of newspapers) use formal Arabic, which is only understood by an estimated 40 percent of Moroccans, and formal French, which only 10 percent of Moroccans understand.[88] French in particular is the language of the elite. The choice of language restricts access to public television for a large portion of society. For illiterate people, for whom TV remains the main source of information and entertainment, TV programming is not fully accessible.

In ethnic terms, the Imazighen are the majority ethnic group in Morocco, yet their culture, called Amazigh, was undermined for many years. During the reign of Hassan II, for political reasons, the regime identified Amazigh culture with pan-Arabism, hence the predominance of Arabic culture and identity. The Constitution defines Morocco as an Arab country and considers Arabic to be the official language of the country. The Imazighen have been calling for more equitable representation in the media and more recognition of their contribution to Moroccan history and culture. In response, King Mohammed VI created IRCAM in 2003, to safeguard and promote Amazigh language and culture. IRCAM has recently applauded and supported the many actions, initiatives, and efforts carried out by the authorities to promote the Amazigh language—called Tamazight—language and culture in the national media. In coordination with the National Dialogue on "Society and Media", IRCAM submitted policy proposals that are designed to consolidate Tamazight culture in the national media landscape. One of the policy recommendations was to find a way to finance a TV station designed primarily for Amazigh audiences.

In terms of gender minorities, Moroccan women's lived experience does not match their constitutional rights and civil status. Since independence in 1956, women have had the right to vote, to own businesses, and to run for public office. But their status in family relationships such as marriage, divorce, custody of children, inheritance, and alimony is far from equal. This has been the site of continued advocacy and awareness-raising efforts by women's rights activists. In response to these inequalities, another major initiative—called the new Family Status Law or *Moudawana*—was decreed in 2003, to protect women's rights. A Freedom House study on women in Morocco, *Women's Freedom in Focus: Morocco*, praised this initiative and noted improvements in the status of women and their rights.[89]

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88. L. Jaidi and M. Zouaoui, *Figure de la Précarité: Genre et Exclusion Economique au Maroc,* Najah El Jadida, Casablanca, 2005.

89. B. Katulis, "Morocco."

4.3.2 Coverage of Sensitive Issues

In terms of programming quotas, and before the launching of the Amazigh TV channel, the 2004 audiovisual law stipulated[90] that public broadcasting must serve the general public and design programs that satisfy the needs of all Moroccan ethnic and socioeconomic groups by providing programs in Arabic and Amazigh. The programs have to be founded on the Islamic, Arab, and Amazigh cultures. As a result, the two main TV broadcasters Al Oula and 2M started airing news bulletins in the three Amazigh dialects: Tarifit, Tachelhit, and Tamazight. Many programs addressing Amazigh art and culture have been aired as well.

The first principle of public service broadcasting is universality of appeal. This principle refers to the extent to which the television shows cater to the different tastes and interests of all segments of society. In order to assess the extent to which the two public service TV stations appeal to the majority of Moroccans, a study was conducted to examine the manifest contents of Al Oula and 2M programming.[91] The areas that were investigated in the quantitative content analysis relate to issues of access to and participation in public service television. Access and participation refer to, among other things, the gender of the TV hosts and guests of the television shows and the languages used. The sample consisted of all locally produced shows in both public stations over the span of one year, from January 2007 to January 2008. The reason for choosing the period between January 2007 and January 2008[92] is that in November 2004, the national audiovisual law assigned public service obligations to the two major television stations, but it was not until January 2006 that the two public stations were committed to these obligations. The content analysis focused on this period to make sure that the public television stations had started to carry out their public service obligations.

The sample includes all the shows that are broadcast during three main time blocks, pre-prime time (7 to 8:30 p.m.), prime time (8:30 to 11 p.m.), and post-prime time (11 p.m. to midnight).[93] Primetime brings the highest ratings and is therefore more meaningful in terms of audience exposure. This sample size consists of 78 shows. The shows must be locally produced, non-fiction, and deal with themes such as education, politics, economy, culture, and society. They include talk-shows, newsmagazines, documentaries, game shows, reality-based shows, debate shows, and practical advice shows. It is important to note that other foreign and locally produced drama and fiction such as television series, films, and sitcoms, and music and sports programs such as live concerts or football games are broadcast during primetime and are excluded from the sample.

With regard to gender, the content analysis indicates that women are under-represented on public service television (see Figure 7).

90. 2004 Audiovisual Communication Law, art. 46.

91. B. Zaid, *Public Service Television Policy.*

92. This period includes two irregular television seasons: the summer (June through August) and the month of Ramadan (mid-September to mid-October). Some shows do not air in the summer. Ramadan is a month of fasting where the audiences' eating habits are disrupted, a fact that affects prime time. Therefore, some shows either did not air or were placed outside prime time, and were therefore excluded from the sample.

93. HACA's designation of prime time was used.

Figure 7

Representation of males and females on Al Oula and 2 M TV stations, 2007–2008
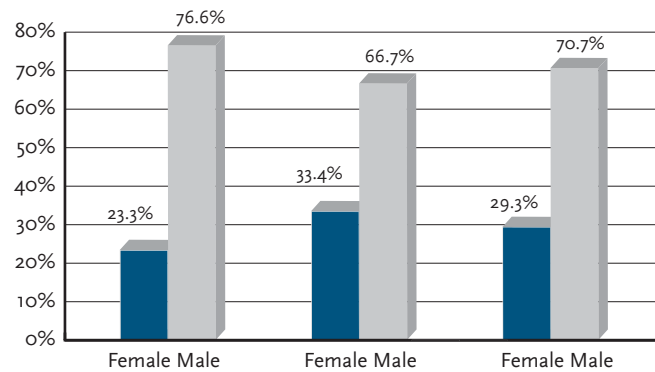
Source: B. Zaid, *Public Service Television Policy.*

According to the Haut Commissariat au Plan, the Moroccan Census Bureau's statistics of 2004, women make up 50.7 percent of the population. Nevertheless, fewer than one-third of the hosts and guests featured on television are women. Of the 78 shows analyzed, 33 did not feature women, compared with only one show that did not feature men. This is the daily show *Sihatouka Koula Yawm* (Your Health Everyday), a five minutes' daily show about health and hygiene. The 33 shows comprise a variety of daily, weekly, bi-weekly, and monthly shows and they address the economy, politics, sports, and education. Besides, Al Oula's *Hiwar* (meaning "conversation" in Arabic) and 2M's *Moubachatan Maakoum* (meaning "Live on the air with you" in Arabic) , two highly rated prime-time live shows, do not feature women. They are both debate shows on politics and current events and are highly respected because they are the first live uncensored shows in Moroccan television history. All the five participants in *Hiwar* and the six participants in *Moubacharatan Maakoum* are men, and they are all from Rabat and Casablanca.
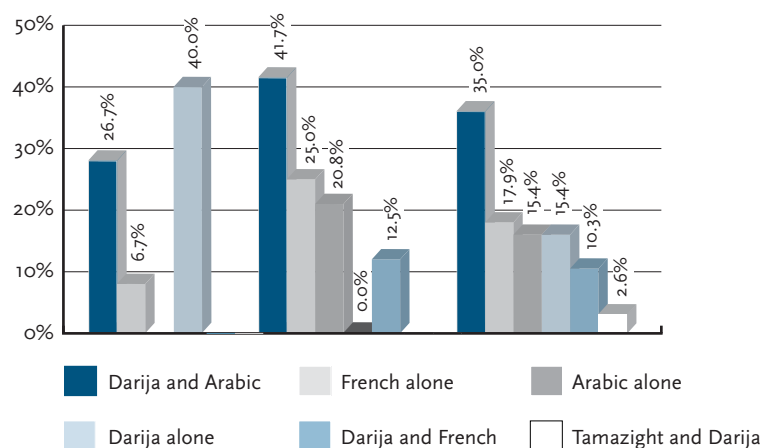
With regard to language, the results indicate that while the use of a mix of Darija and Arabic has the highest percentage (35 percent), it is followed by the use of either Arabic or French with 33.3 percent. What is even more striking is that the number of shows that use French alone is higher than the number of shows that use Darija alone or Arabic alone. Seven shows use French, while six use Arabic and only two use Darija alone. The percentage of language use differs between the two stations. (See Figure 8.)

The study concluded that the choice of language restricts access to and participation in public television for a large portion of Moroccan society. The choice of language allows access and participation for only the wealthy and highly educated classes. Half the literate population, 30.3percent of the population aged 10and above, knows how to read Arabic and French. About 17.3percent or one-third of the literate population knows how to read and write Arabic alone.[94]

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94. Haut Commissariat au Plan, *Recensement*. Available online at http://www.hcp.ma/pubData/Demographie/RGPH/RGPH_Rapport_National.pdf (accessed 20 May 2010).

Figure 8

Use of languages on Al Oula and 2M, 2007–2008

Darija and Arabic ■ French alone □ Arabic alone ■
Darija alone □ Darija and French ■ Tamazight and Darija □

Source: B. Zaid, *Public Service Television Policy.*

In 2010, an Amazigh TV channel was launched. Top management of this channel argued that the new channel's programming would deal with all Amazigh current affairs and go beyond folk music and dancing in the hope of improving the image of Amazigh art and culture. The channel's goal is to be close to its primary target audiences and to offer an independent voice. On the official website of SNRT, the Tamazight channel is self-defined as "open, tolerant, and modern." IRCAM is working on organizing training sessions for its staff to increase professionalism in their station, but it is too early to judge whether it is living up to what is says it will do.

In April 2009, SNRT launched a new local radio station covering the mountainous northern Rif region. The majority of the broadcast is in Tarifite. The goal of this new station is to promote local culture as a sign of the cultural promotion proclaimed by the regime. The program is broadcast from 9 a.m. to 7 p.m.

The Amazigh ethnic issue caused some tension and conflict during the reign of Hassan II at a time when media functioned under an authoritarian regime. The new era of Mohammed VI (from 1999) has witnessed important improvements in terms of media freedom and human rights. Media policy changed and the creation of IRCAM smoothed off the rough edges of any potential conflict. By the time Moroccans started enjoying the new freedoms made possible under the new regime, many initiatives had been started that were clear signs of inter-ethnic improvements and that relieved Morocco of inter-ethnic conflict.

The lack of direct access on the part of Amazigh activists (under Hassan II) to the broadcast media, where radio and television were government-owned and controlled, have forced them to use non-mainstream media as mobilization tools in the political and cultural battle for the reconstruction of a linguistically-based identity, public sphere, and society. For many years, Amazigh activists used the internet as an alternative

platform for their activism.[95] Their access to print was very restricted under Hassan II, and they still have no community radios.

4.3.3 Space for Public Expression

Digitization has a major impact on the development of websites. Digital media have therefore enlarged and improved the space for public expression for these minority groups. For instance, it would be hard if not impossible for sexual minorities to use old media (newspapers, magazines, TV or radio) to further their causes. Online communication is the only platform they have for public expression. A magazine called *Mithly* (meaning "Like me" in Arabic) has recently been created targeting exclusively the gay population and already has a well-developed website of its own.[96] It is edited in Arabic and is run by a group called Kifkif (meaning "We're the same" in Darija).

4.4 Political Diversity

4.4.1 Elections and Political Coverage

Digitization has triggered no changes in the regulation of the media coverage of elections. The news sources that moved to the internet use it as a new platform for their contents. They are still regulated by the 2002 Press Code, the law that regulates print media. The Press Code is a severe legal document that maintains prison sentences for journalists and gives the government the right to shut down any publication prejudicial to Islam, the monarchy, territorial integrity, or public order.

It is important to note, however, the contribution of Al Jazeera to Morocco's most recent parliamentary elections, in 2007. Although Al-Jazeera is an international news network, it has become important to national election campaigns as a channel for political information. Al Jazeera primed stories and framed the context of the electoral campaigning. It provided adequate coverage of the election, even though it had a vested interest in talking up its most conjectural and confrontational aspects to maximize appeal to Moroccan and other Arab viewers and readers. Underlining its position as the most popular online news and information destination in Morocco, Al-Jazeera is the second most visited news website after Hespress, according to Alexa.com, and is ranked fourth according to Google Ad Planner.

Moroccan citizen journalists and bloggers initiated an internet-based campaign to fight against electoral corruption. According to Zakaria Rmidi,[97] a famous blogger, the campaign was a success because many newspapers at that time used entries, pictures, and videos from the Moroccan blogosphere.

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95. Some of their main websites are: http://www.amazighworld.org/, http://www.berberworld.com;http://www.agraw.com/ (accessed 31 August 2010).

96. See http://www.mithly.net (accessed 1 August 2010).

97. See Rmidi's profile at http://www.talkmorocco.net/articles/author/zakaria-rmidi/ (accessed 1 August 2010).

4.4.2 Digital Political Communications

Until 2007, Moroccan political parties were not enthusiastic about using the internet, yet in the context of the 2007 elections, almost all leading parties launched websites to promote their candidates and election programs. Most of them lacked a smart web political marketing strategy. In these elections internet campaigning became more interactive, especially through the use of blogs. Television remains the major source of news for the public to obtain information about the parties and the candidates.

The Party of Progress and Socialism and the Istiqlal Party used Short Message Service (SMS) to reach out to potential voters and keep them updated on their campaigns. This was the first use of mobile phones to mobilize party members and others to vote. This practice was conducted in a legal and regulatory vacuum. Some analysts critically questioned how these parties had access to the personal information of mobile subscribers. There is so far no law that regulates database-driven and direct marketing in Morocco.

Daba 2007 (meaning "Now 2007" in Darija) is an association created before the 2007 elections, in a context of political disaffection among the most dynamic segments of society. This context was characterized by the following facts and figures: 50 percent of young people did not register to vote, 68 percent had no confidence in politics, 95 percent did not identify with any mainstream political movement, and less than 1 percent of women belonged to political parties. Against this background, Daba 2007 association's primary goal was to mobilize Moroccans of all ages to vote. The association created a website to provide information and to keep communicating with its audiences.[98] It used the internet as an important political marketing tool. The association also advocated the use of the internet to attract youth to politics. In July 2007, it organized a joint conference with the National Democratic Institute's Morocco branch about the use of new technologies. The organizers trained many activists to function as opinion leaders in citizen journalism. The workshops trained bloggers on the use of micropublishing tools to promote the importance of political participation.

One interesting phenomenon in the 2007 elections was the launch of Selwane.TV by a group of young internet users from the city of Sale (hence the name of the site), near the capital of Rabat. The rationale behind the creation of this site, according to one of its founders, Abdellatif Jelzime, is that mainstream news media only allow major political parties to promote their programs and limit the opportunities for political commentary on elections only to those promoting participation. Selwane.TV streamed videos of all political parties, including those boycotting the elections. The Al Jazeera news channel devoted one of its news stories to this initiative.

There has been no attempt to evaluate the precise effects of the political use of the internet on communication by political parties. However, voter turnout in 2007 was the lowest in Morocco's history, at only 37 percent.

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98. M. Chaoui, "Daba 2007 political mobilization for 2007 elections," Senior Thesis Project in Communication, Al Akhawayn University in Ifrane, December 2007.

In summer 2007, the website of *At-Tajdid* newspaper, the mouthpiece of the Justice and Development party, collected email addresses from its visitors, by requiring them (including activists and sympathizers) to supply their electronic contact information (e.g. email accounts). In the legislative election of September 2007, the newspaper sent approximately more than 28,000 e-mails and distributed information about the campaign.

4.5   Assessments

Digitization does not have a significant impact on the work of journalists. It does, however, affect the quality and accuracy of their reporting. The main changes in their work are triggered by the new liberalization of the audiovisual sector, the rise of private print media, and the new relatively open political environment. Journalism faces more fundamental challenges related to the profession itself, regardless of digitization. There were calls for major reforms in the media, for a new legal framework that would provide journalists with adequate working conditions, and a new Press Code that eliminates prison sentences. At this time of writing, these reforms have not taken place.

The government does not recognize online journalism as a legitimate vocation. There is no legal framework to regulate it. Online journalists lack the necessary credentials and are not considered professional journalists.

Digitization has both a positive and a negative impact on the quality and accuracy of reporting. On the one hand, it opened the gates for news and information to flow with a speed and efficiency that had never been seen before. Journalists have unlimited access to information and original sources. On the other hand, bad practices in news reporting that pre-existed digital media have been intensified. Data theft and plagiarism, reporting unverified information, reliance on a few unnamed sources, and presenting opinions as facts are even more widespread than before.

Given the inadequate working conditions of most journalists, ethical principles such as truthfulness, accuracy, objectivity, impartiality, fairness, and public accountability are looked upon with cynicism. The government and the news media have not yet established a code of ethics or industry-wide self-regulatory bodies such as press councils to set up standards of accountability.

Digitization has had a minimal impact on election coverage. The high rate of illiteracy and the cost and availability of the internet, combined with an apolitical public sphere, have radically limited any effect these new news platforms might have on the elections. For minority groups, digital media have enlarged and improved the space for public expression.

5. Digital Media and Technology

5.1   Spectrum

5.1.1   Spectrum Allocation Policy

The ANRT is an independent government agency created in 1998 to regulate and liberalize the telecoms sector. The founding law of the ANRT considers this sector to be a driving force for social and economic development. Liberalizing the telecoms sector would help increase GDP, create jobs, support the private sector, encourage internet-based businesses, and so forth.

The preamble of the 1997 laws on post and telecoms states that the creation of ANRT is meant to create an efficient and transparent regulatory framework that favors competition among telecoms operators.[99] It also aims to provide a public service by making telecoms services available to all social classes in the framework of the national social and economic development initiatives. ANRT makes sure prices are low and are affordable for the majority of Moroccans. For instance, Maroc Telecom, as the oldest telecoms provider, controls the telephone cable infrastructure. When alternative operators such as Médi-Telecom or Wana need access to those cables, ANRT sets the price so that Maroc Telecom does not impose high prices on its rivals, which would increase the cost of the rivals' services. The ANRT makes sure competition in the telecoms market is fair and leads to affordable services to Moroccan consumers.[100]

The government-owned Maroc Telecom (Ittissalat Al Maghrib, IAM) was the monopoly telecoms provider until 1999. The ANRT granted the license for the country's second telecoms operator to Médi-Telecom in 1999. Médi-Telecom is a private consortium led by Spain's Telefonica. In 2007, Wana (formerly Maroc Connect) became the third telecoms company in Morocco. It is currently a subsidiary of Ominum North Africa (ONA), the leading Moroccan industrial, financial, and services conglomerate. WANA was granted a license to operate mobile telephony in 2007. Wana is an integrated telecoms operator currently offering fixed

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99. *Lois régissant la poste et les télécommunications* (Laws governing the post and telecommunications), available at http://www.anrt.ma/fr/admin/download/upload/file_fr1825.pdf (accessed 11 August 2010).

100. Interview with Mohammed Atouf, Senior Manager in the ANRT. 15 June 2010.

and restricted mobility wireless services (branded as "Bayn"), full Code Division Multiple Access (CDMA) mobility services (branded as "inwi"), and internet and data services throughout the country.

Spectrum allocation is granted to institutions, that is, telecoms operators, not to groups or users.[101] Morocco has not yet started the process of digital switch-over, and the available spectrum is not saturated, so there have been no calls for intervention in favor of news and information providers. ANRT is not concerned with media content providers. It responds to HACA's request for spectrum allocation to new licensees. HACA addresses content issues, while the ANRT provides technical services. ANRT does not make distinctions in terms of whether the new licensee is a public or private body, or whether it provides a public service or not. It provides the same service and assigns the same spectrum usage fees.[102]

5.1.2   Transparency

There are no indications that spectrum is awarded on the basis of calculated costs and benefits. Judging by the information in ANRT documents, spectrum is allocated transparently. No other reliable information on this matter is available.

5.1.3   Competition for Spectrum

Spectrum availability is managed and regulated by ANRT. The agency decided to limit the telecoms market to three operators, Maroc Telecom, Médi-Telecom, and Wana Corporate. This decision was made in accordance with the size of the population, the nature of the telecoms market, and the principle of competition and growth.[103] It can be said that operators have not tried to reduce the spectrum availability for rivals.

5.2   Digital Gatekeeping

5.2.1   Technical Standards

There has been no public or media debate on technical standards.

5.2.2   Gatekeepers

Because digitization has not begun, there are no gatekeepers in digital broadcasting, such as multiplex operators.

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101. Interview with Mohammed Atouf, see footnote 102.

102. Interview with Mohammed Atouf, see footnote 102.

103. Interview with Mohammed Atouf, see footnote 102.

5.2.3 Transmission Networks

The distribution of spectrum resources is the responsibility of ANRT. It represents the government in matters of spectrum allocation and distribution.[104] Signal transmission is the responsibility of the three telecoms companies, and each has the required infrastructure to handle it.[105]

5.3 Telecoms

5.3.1 Telecoms and News

On 19 May 2006, Maroc Telecom was authorized byHACA to broadcast national and international television channels via ADSL. Maroc Telecom offered existing TV programs in the form of packages, each with a specific cost. Maroc Telecom functions as a gatekeeper in terms of deciding which channels to include in its packages. In terms of news and information, Moroccan and most mainstream international news channels are included.[106] However, the dominance of French channels may be noted, which is an indication that the service is meant for the Moroccan French-speaking elite.[107] One may also notice the absence of Arab channels, with the exception of Al Jazeera and Al Arabiya, and the religious channels, with the exception of the government-owned Assadissa. The cost and dominance of French TV channels reflect the target audience of Morocco's French-speaking elite who can afford such services.

5.3.2 Pressure of Telecoms on News Providers

Maroc Telecom has not produced news content so far, and it has not influenced the availability of news and information. The TV channels already exist in their packages and are available to Moroccan audiences via satellite TV, except for subscription-based channels such as Canal + and National Geographic, and these are entertainment, not news channels.

That having been said, there is no question that telecoms—media convergence, and competition from media content providers, are driving telecoms businesses to transform themselves from mere connectivity providers into smart operators offering added-value solutions such as mobile payment, Internet Protocol Television (IPTV), digital TV, and mobile TV. In 2008, Maroc Telecom bought 39 percent of Medi Sat 1 shares.[108] This investment by a telecoms operator in a media company suggests the strategic necessity for many telecoms companies to invest in content-provider companies.

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104. Interview with Mohammed Atouf, see footnote 102.

105. Interview with Dr Yassine Salih Alj, Assistant Professor of wireless communication at Al Akhawayn University in Ifrane and International Expert in telecommunications, 14 December 2010.

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

107. The French channels include: TF1, France 2, France 3, France 5, TV5, LCI, Canal +, Canal + Cinema, Canal + Famille.

108. Maroc Telecom, *Rapport Annuel 2008,* available at http://www.iam.ma/Lists/Tlchargement%20Finance/Attachments/248/Maroc-Telecom-Rapport-Annuel-2008.pdf (accessed 10 June 2010) (hereafter Maroc Telecom, *Rapport Annuel 2008*).

5.4   Assessments

According to ANRT's senior management, the spectrum allocation is not politicized.[109] First,according to its official website, the ANRT is "a public institution that acts under the umbrella of the Prime Minister and has legal and financial autonomy."Second, there are provisions in the founding law of ANRT that clearly state its public service mission and that telecoms services must be available to all social classes in the framework of national social and economic development initiatives. The ANRT makes sure prices are low and affordable by most Moroccans.

Like any other regulatory body, ANRT is a site of contested power and the conflict of interests. Some journalists argue that ANRT must be politicized because its director is appointed by a *Dahir* (Royal Decree) and represents the economic and political interests of the King. However, international organizations such as the World Bank and the ITU have not expressed any type of criticism about ANRT's neutrality.[110] Both the World Bank and the ITU presented Morocco as one of the best case studies that other countries may learn from about fair competition and neutrality.

Since its creation in 1998, ANRT has demonstrated its autonomy through its policies, and through its resolve to monitor and enforce compliance with license conditions. In addition, clear rules and transparency have prevented political interference and corruption. The processing of new applications has been professional; the ITU considers Morocco a model in providing almost universal access.[111] Moreover, the Economist Intelligence Unit (EIU) has presented Morocco as a lesson in competition to other countries in the region, arguing that it "has made a clear choice to place itself squarely in the modern, European camp with a determined move to liberalise its telecoms market." According to the EIU, this is "the result of ANRT's clear mechanism for settling regulatory disputes, which is used by the International Telecommunications Union (ITU) in its ICT Regulation Toolkit as a case study in best practise."[112]

The spectrum regulation is appropriate for the country. Besides the liberalization process initiated by ANRT which opened the sector to competition, its role in making telecoms service a universal service is quite important. The PACTE and GENIE projects are good illustrations of this. Besides, in its recent report on

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109. Interview with Mohammed Atouf, see footnote 102.

110. Caroline Simard, "Morocco's ANRT Guidelines Project Related to Fundamental Regulatory Aspects," available at http://www.itu.int/ITU-D/treg/Newsletters/Research%20Material/MAR_Projetlignesdirectrices.pdf (accessed 31 January 2011);BjörnWellenius and Carlo Maria Rossotto, "Introducing Telecommunications Competition through a Wireless License: Lessons from Morocco," 1999, available at http://rru.worldbank.org/documents/publicpolicyjournal/199welle.pdf (accessed 31 January 2011).

111. ITU, "Effective regulation, Case Study: Morocco," 2001, available at http://www.itu.int/ITU-D/treg/Case_Studies/effective-regulation/Maroc.pdf (accessed 31 January 2011).

112. Economist Intelligence Unit, "Morocco: A lesson in competition," 10 August 2007,available at http://www.ebusinessforum.com/index.asp?layout=rich_story&channelid=4&categoryid=31&title=Morocco%3A+A+lesson+in+competition&doc_id=11209 (accessed 31 January 2011).

"Measuring the Information Society 2010," the ITU described Morocco as a country that made considerable progress in 2009.[113] As an outcome of the ANRT's liberal telecoms policies, Morocco has three providers, Maroc Télécom, Médite,l and Wana. The ANRT takes many measures to make telecoms services accessible to most segments of the population.

The allocation and regulation of white spaces and digital dividend has not taken place since Morocco has not yet embarked on the process of digital switch-over.[114]

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113. ITU, "Measuring the Information Society: The ICT Development Index,"2009, available at http://www.itu.int/net/pressoffice/backgrounders/general/pdf/5.pdf (accessed 18 June 2010).

114. Interview with Dr Mohamed Boulmalf, Associate Professor of Networking at Al Akhawayn University in Ifrane and International Expert in telecommunications, 15 June 2010.

6. Digital Business

6.1 Ownership

6.1.1 Legal Developments in Media Ownership

Morocco's media system consists of a mix of public and private ownership and allows for the government's intervention to ensure a public service. Morocco is home to a large number of print publications, many of them owned by political parties, and a growing number is owned by private persons. Political party newspapers receive government subsidies.

Television is still overwhelmingly government-owned and editorially supportive of the government. With the liberalization of the audiovisual sector, it is now technically legal to establish private television stations. There has been some progress on private radio stations which have increased from six stations in 2006 to 24 in 2008. Of these radio stations, 18 are new private stations.[115] Six television station licenses were granted, but all were for government-owned television stations except Medi 1 TV.[116] All new stations are thematic except for Laayoun station and Medi 1 TV which are, respectively, a regional station in the southern province of Morocco and a news channel. The other stations are Arriyadia (sports), Assadissa (religion), Arrabia (education and culture), and Aflam TV (fiction).

Article 21 of the 2004 Audiovisual Communication Law stipulates that any broadcasting company or shareholder in a broadcasting company can own or control another broadcasting company as long as he/she/it does not exceed 30 percent of the shares of the other company. This is intended to prevent any individual or company from controlling more than one media outlet. There have been no subsequent digitization-related legal developments affecting media ownership.

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115. HACA, "List of Radio Stations," available at http://www.haca.ma/indexFr.jsp?id=65 (accessed 12 May 2010).

116. Medi 1 TV is the TV affiliate of Medi 1 radio. Medi 1 radio was launched as part of a Moroccan-French partnership comprising associates from banks and major enterprises of the two countries. The radio was an initiative of King Hassan II and French President Valéry Giscard d'Estaing. Both Medi 1 radio and TV are editorially supportive of the Moroccan government. Initially it was launched as a satellite news TV station and in November 2010, it changed its name to Medi 1 TV because of its broadcasting delivery system and the change in the nature of its contents. It became a terrestrial TV station offering general programming.

6.1.2   New Entrants in the News Market

The major new entrants in the news sector are private radio stations. By virtue of the 2004 Audiovisual Communication Law, the number of private radio stations increased from one in 2006 to 18 in 2009. The new stations reinvigorated pluralism and diversity in the audiovisual sector, especially through their live debates and news. They created the possibility for national debates on a variety of issues. Unlike public TV, private radio news programs tend to focus on local, regional, and national events. They also tend to use a language that is accessible to their listeners, somewhere between modern standard Arabic and Darija. They have provided access to media for a variety of different types of voices, information, and viewpoints. Unfortunately, there are no statistics on these stations' audience share.

The other new entrants are mainly new online media news and entertainment providers. Hespress.com, Menara.com, hibapress.com, lakome.com, Bladi.net, Yabiladi.com, and emarrakech.info are online news providers. Given the high rate of illiteracy, the cost and low availability of the internet limit any impact that these new digital platforms might have on diversity and pluralism.

6.1.3   Ownership Consolidation

No significant horizontal or vertical mergers or consolidation of ownerships have taken place in Morocco that would in any way be either helpful or detrimental to media pluralism and diversity. Besides, Article 21 of the Audiovisual Communication Law prevents any company or stakeholder from controlling more than one TV or radio station. This law has so far been fully applied and upheld.

6.1.4   Telecoms Business and the Media

The telecoms companies have had very limited involvement in the media industry as media content producers and providers. The ADSL service that Maroc Telecom provides to its internet customers does not meant that the telecoms company can exert any influence on the independent performance of the media. With only 10,000 subscribers as of December 2008,[117] the service reaches less than 0.03 percent of the population.

However, the overwhelming advertising power that the telecom companies represent and the communication infrastructure that they control may lead these companies to invest more in the media sector. In fact, in 2008, Maroc Telecom acquired 39 percent[118] of the shares of Medi 1 TV; the TV station was going through financial troubles. This investment by a telecoms operator in a media company suggests the strategic necessity for many telecoms companies to invest in content creation companies.

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117. Maroc Telecom, *Rapport Annuel 2008.*

118. Maroc Telecom, *Rapport Annuel 2008.*

6.1.5 Transparency of Media Ownership

The public has limited access to information regarding ownership of media. For TV and radio stations, there were two rounds of license granting in 2006 and 2009. In both instances, HACA held press conferences to announce the new licenses and their owners and to explain why licenses were denied to other applicants. It also publishes information on its website about the number of licenses it granted and the number it denied. The website reports do not, however, provide further information on ownership.[119]

Concerning print media, the Ministry of Communication requires information about ownership before granting authorization for newspapers and magazines. Information about ownership is in the public domain and can be accessed through the Ministry of Communication. Newspapers and magazines are legally required to provide information about their licensing registration number, the publisher, and the director of the publication.[120]

6.2 Media Funding

6.2.1 Public and Private Funding

In recent times, the economy has diversified substantially due to the three economic policies, including privatization, liberalization, and deregulation, especially in the telecoms sector. The advertising market was estimated to grow by 8.8 percent in 2010,[121] from US$284 million in 2009. The most significant increase in advertising spending occurred in telecoms because of the stiff competition between the three operators.

Advertising in print media accounted for less than 15 percent of the total advertising value in 2009.[122] With 24 major newspapers, the print media market is saturated. In this context, some authoritarian forces exert political and commercial muscle to use advertising budgets as a control mechanism to censor and stifle private print media. *Le Journal* and *Al Jarida Al Oula* were forced to close down due to a deliberate boycott by major advertisers. The low levels of literacy and readership create intense competition for print advertising. Television has been the dominant media platform, accounting for 60 percent of total advertising expenditure,[123] with the telecoms sector spending the most.

Since 1987, the government has followed the policy of giving fixed subsidies to newspapers and magazines that support its official versions of political reality. In 2006, 50 printed media outlets (18 dailies, 27 weeklies,

119. HACA, *Rapport de la Haute Autorité de la Communication Audiovisuelle sur l'attribution de nouvelles licences*, available online at http://www.haca.ma/pdf/Rapport%20G2%20MEP.pdf (accessed 22 February 2011).

120. Ministry of Communication, *Le Rapport sur la Presse Ecrite et les Médias Audiovisuels Publics 2006*, available online at http://www.mincom.gov.ma/MinCom/Fr/MenuGauche/s+orienter/ (accessed 22 February 2011).

121. Dubai Press Club and Value Partners, "Arab Media Outlook, 2009–2013," available at http://www.fas.org/irp/eprint/arabmedia.pdf (accessed 18 June 2010) (hereafter Dubai Press Club and Value Partners, "Arab Media Outlook, 2009–2013").

122. Dubai Press Club and Value Partners, "Arab Media Outlook, 2009–2013."

123. Dubai Press Club and Value Partners, "Arab Media Outlook, 2009–2013."

and five monthlies) were supported to the tune of US$4 million combined.[124] The government understands the effectiveness of this form of indirect control; this is why it decided to increase the subsidies as part of its mechanisms of political control. The financial dependence of the print media on the government was thus normalized. By using the government's subsidies, media are allowed to criticize the behavior and policies of the government but only within certain parameters and limits defined *a priori*.

One of the newspapers that does not depend on government subsidies is *Al Massae.* It is a private newspaper that achieved a phenomenal success, becoming the most widely circulated newspaper, selling an average 110,000 copies every day. The paper provides sharp criticism of the government, high-profile public officials, and business tycoons. Many newspapers and observers have questioned the paper's ability to survive; they say the paper must enjoy political backing to remain protected from repercussions.[125]

A decline in total revenues in the newspaper business is anticipated. Advertising expenditure on print media in general and newspaper in particular is likely to decrease especially in the current economic recession. Young people in Morocco, as elsewhere, spend most of their media time online. Newspapers face competition not only from e-journalism, but also from a dynamic blogosphere where people want new and fresh reporting. (See Table 10.)

Table 9

Morocco's advertising market (in US$ million), 2007–2012

	2007	2008	2009	2010	2011	2012
Total	231	268	284	309	338	373
Internet	0	0.9	1.9	3.1	4.5	6.2
Radio	12	14	15	16	18	19
Magazines	18	18	18	15	14	16
Television	128	154	167	190	209	230
Newspapers	23	24	24	21	22	24

Source: Dubai Press Club and Value Partners, "Arab Media Outlook, 2009–2013."

Table 10

Cost of advertising on Al Oula and 2M (in US$), 2008

Prime-time rates (30 sec)	Prime-time rates (30 sec)	Off-prime-time rates (30 sec)
Al Oula	3,335	1,066
2M	5,066	1,600

Source: Mindshare, "Media Scene in Morocco 2008," unpublished document.

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124. Ministry of Communication, *Rapport annuel 2006.*

125. Arab Press Network, "Morocco", available at http://www.arabpressnetwork.org/newspaysv2.php?id=117 (accessed 20 August 2010).

Table 11

Top 10 advertisers by expenditure (in US$ million), 2005

Advertiser	TV	Radio	Press	Billboard	Total
Maroc Telecom	32.2	2.7	1.8	11.6	4.8
Medi Telecom	14.6	0.4	0.1	4.1	20.7
Procter & Gamble	10.6	0.2	0.3	0.0	11.5
Unilever	5.6	0.1	0.3	0.8	7.0
Lesieur Cristal	4.9	0.2	0.3	1.1	6.7
Loterie National	4.6	0.1	0.1	0.1	5.0
CNPAC	3.1	0.7	0.7	4.5	9.1
CentraleLaitiere	3.3	0.1	0.1	0.8	4.4
Coca-Cola	2.7	0.1	0.0	1.2	4.2
F BelMaroc	3.5	0.5	0.1	0.2	3.9
Others	61.4	12.4	61.6	47.4	183.1
Total	147.3	17.4	6.6	68.7	299.9

Source: Imperium from the Oxford Business Group's *The Report: Emerging Morocco 2007.*

Figure 9

Advertising projections, 2013
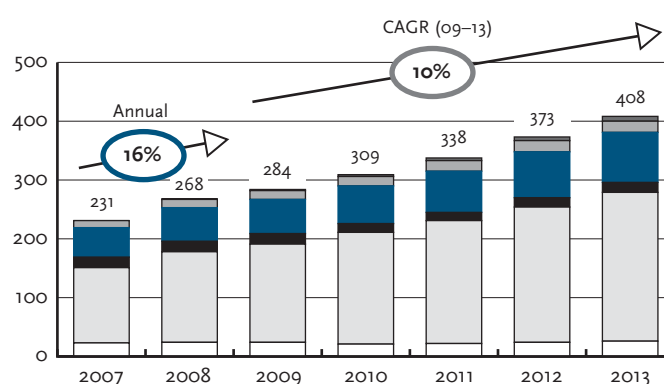
(All figures in US$ million)	2007	2008	2009	2010	2011	2012	2013	CAGR* (09–13)
Total	231	268	284	309	338	373	408	9.6%
■ Internet	0	0.9	1.9	3.1	4.5	6.2	8.2	45%
▨ Radio	12	14	15	16	18	19	19	6%
■ Out of home (includes cinema)	50	57	58	64	70	78	85	10%
■ Magazines	18	18	18	15	14	16	17	−1.4%
▢ Television	128	154	167	190	209	230	253	11%
▢ Newspapers	23	24	24	21	22	24	26	2.1%

Source: Dubai Press Club and Value Partners from the *Arab Media Outlook (AMO) Report—2009/2013.*

Note: * CAGR: compound annual growth rate.

6.2.2 Other Sources of Funding

All other funding sources such as subscriptions to print media are insignificant in terms of income. Direct marketing tools such as advertising inserts in print media are not common practice. Subscriptions for broadcasting exist but only for satellite TV, namely Al Jazeera Sports. Morocco's broadcasting network does not contain a cable TV network or subscription-based satellite TV.

6.3   Media Business Models

6.3.1   Changes in Media Business Models

In March 2009, *Aujourdhui le Maroc* newspaper launched the first electronic payment service of its online content by using credit and debit cards as a method of payment.[126] It was the first Moroccan newspaper to sell its media content online for a subscription. The newspaper is a French-speaking paper for the elite. The number of subscribers to both the print and online versions is 6,000.[127] By subscribing, browsers can customize a "My Diary" application and access the full online version on a daily basis before the print version is available at the kiosks. This type of content delivery is likely to grow since the new payment service is fully secured by the Morocco Telecommerce Interbank Electronic Payment Centre, which ensures the security of electronic monetary transactions. However, the monetization of media content will face some challenges. The first one is that Moroccans are not yet ready to pay for online content. The second is a marked lack of credit card culture and the strongly embedded cash culture.

6.4   Assessments

Digitization has had no effect yet on monopolies and dominant positions. The government is the only monopoly in terms of media ownership. It has control over radio and television and their online platforms. It also exercises significant influence on political party newspapers and has a legal arsenal (the Press Code and the Audiovisual Communication Law) to control and manage the competition. Only the government can own and control more than one outlet.

Transparency of media ownership did not increase in the past five years. The first TV and radio licenses were given exclusively to government-owned TV and radio stations. Through HACA, the government has made it impossible so far for other private investors to create TV stations. In 2008, five TV license applications by private investors were denied by the HACA, which cited "the deteriorating situation in the advertising

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126. The newspaper's website is www.aujourdhui.ma (accessed 10 June 2010).

127. *Aujourdhui le Maroc*, Qui Sommes Nous?, available at http://www.aujourdhui.ma/?mod=nous (accessed 12 August 2010).

market."[128] The government clearly abused the powers of the regulator (HACA) and managed to secure licenses for its own broadcasters to retain control of this sector.

Ownership under digitization did not have any significant impact on media performance and independence. Digitization has so far been partial. New digital platforms function as extensions of existing media.

The most dangerous threat to independent media, more particularly in public service media, is the economic power of the telecoms companies, especially of Maroc Telecom. The overwhelming advertising power that the telecoms companies represent, and the communication infrastructure that they control, may lead these companies to invest more in the media sector.

Moroccan media outlets use four financing models, as follows.

- **Subsidy:** the government pays media firms in return for public service. This applies to public service TV and radio and to political party newspapers. The aim, as stated by the government, is to help these media firms be more independent and distanced from all vested economic interests.

- **Advertising:** the media firm sells advertising, and the content is made available to consumers "free", in return for exposing them to the advertising. This is today's dominant business model in Morocco's media and permeates public service and non-public service media content providers.

- **Subscription:** consumers access content in return for a monthly or annual fee. This is the case for satellite TV networks such as Al Jazeera and ART.

- **Carriage fees:** TV channels make their contents available via a TV operator's system. ADSL, a Maroc Telecom digital TV service, is a carrier of many TV channels. Consumers pay a monthly fee to have access to the contents of these TV channels. The offer is in the form of bouquets, each offering a range of TV channels that respond to the preferences and budgets of consumers.

Public service television is not advertising-free, nor are the political party newspapers. They also compete for advertising money. The most viable financing model for the production of publicly relevant news and information depends on government subsidy. Public service radio offers a good case. It is free of advertising and offers a wide range of publicly relevant news and information programming. Radio programming is not expensive to produce compared with TV programming, and this model remains financially unsustainable given the limited government resources allocated to media production.

Other alternative forms of funding such as product placement are illegal in Morocco. Part of HACA's monitoring function is to watch for instances where TV or radio stations display or mention a brand name during regular programming. HACA sends a memorandum to the station to ask them to refrain from such actions.

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128. HACA, *Rapport sur l'attribution de nouvelles licences d'exploitation de services radiophoniques FM et sur les extensions de couverture des radios à de nouveaux bassins d'audience* (Report on the awarding of new licenses for FM radio services and on the extensions of the coverage by radio stations to new audiences), 2009, available at http://www.haca.ma/pdf/Rapport%20G2%20MEP.pdf (accessed 9 June 2010) (hereafter HACA, *Rapport sur l'attribution*).

7. Policies, Laws, and Regulators

7.1   Policies and Laws

7.1.1   Digital Switch-over of Terrestrial Transmission

7.1.1.1 Access and Affordability

The policies and legal provisions that have an impact on pluralism and diversity are so far the same for digital as for analog broadcasting. The provisions in the 2004 Audiovisual Communication Law (see *section 2.1.1*) are applicable to audiovisual communication whether via analog broadcasting or via their digital platforms.

There are no provisions yet that specify access (to signal carriers and multiplexes) and affordability requirements that must be met before analog signals can be switched off. All published documents by ANRT were consulted and there is no indication that such provisions exist.

7.1.1.2 Subsidies for Equipment

The DTT service that the Ministry of Communication launched to allow households to receive digital broadcasting signals was subsidized by the government. The cost for the government is US$12 million to deliver free digital content. The equipment that the subsidy covers is the DTT receivers. After the subsidy, the cost is US$50 for each receiver. This initiative indicates that there is a strong political commitment to provide affordable public service broadcasting for all households.

In terms of access to news and information, Moroccans watch TV through their aerial antennas or via satellite dishes. With aerial antennas, it is only possible to capture the signals of Al Oula, 2M, and Medi 1 TV. The DTT service allows audiences to watch all the other Moroccan satellite channels such as Al Maghribia, Arrabia, Arriyadia, Assadissa, and Aflam TV. None of these channels is a news channel. With DTT TV, the government wants to make sure Moroccans are watching Moroccan channels in digital quality. The availability of satellite channels in most households gives audiences a range of contents, most of the time with better quality contents than those provided by Moroccan channels. DTT is meant on the one hand to package the Moroccan channels for households without access to satellite TV, and on the other hand to offer an alternative for households with access to satellite TV.

7.1.1.3 Legal Provisions on Public Interest

There is no legal framework yet for digital switch-over.

7.1.1.4 Public Consultation

The government has initiated two public consultations on policymaking in the past five years. The first was in 2005, when the Ministry of Communication considered the status of journalism and media, while the second, mainly a continuation of the first, was initiated by parliament in 2009. Given the many challenges facing the media, it was not the new communication technologies that triggered such consultations, but more fundamental issues: freedom of the press, the necessity of legal reforms and a code of ethics, media professionalism, access to government information, and so forth.

7.1.2 The Internet

7.1.2.1 Regulation of News on the Internet

News delivery on the internet and mobile platforms is not yet regulated. The law that is currently applied to online journalists is the 2002 Press Code. Since Mohammed VI's accession in 1999, and following the reform of the Press Code in 2002, there was hope that radical reforms of press laws would follow. This has not happened. The new Press Code still maintains prison sentences for journalists and gives the government the right to shut down any publication "prejudicial to Islam, the monarchy, territorial integrity, or public order." The internet legal cases discussed in *section 3.2.1* were handled using the 2002 Press Code.

In section II of the code, entitled "*Délit contre la chose publique*" (Offence against the public matter), Article 41 states that anybody who offends in any way, that is, in writing, print, audio, video, a poster, or a speech, the king and the royal princes and princesses will be imprisoned for between three and five years and must pay a fine of US$1,000–10,000. The same sentence applies to anybody who attacks Islam, the monarchy, and territorial integrity (Western Sahara). The publication can be suspended for up to three months or permanently banned. Article 42 stipulates that any disturbance of public order due to publication, diffusion or reproduction in bad faith of false information, false allegations or fabricated facts shall be punished by a prison term of between one month and one year and a fine of US$120–10,000, and mandates a sanction of five years' imprisonment for publication, diffusion or reproduction of information that disturbs military morale. Articles 45, 46, and 47 stipulate that defamation vis-a-vis the tribunal courts, the military, public administrations, members of the government, and any public person shall be punished by a prison term of between one month and one year. Article 52 protects heads of foreign governments, their ministers of foreign affairs as well as members of their diplomatic corps by punishing any offence towards them with between one month and one year's prison sentence and a fine of US$1,000–10,000. There is no specific definition of "offence" or "prejudice" towards the monarchy, Islam, or national security. Judges may interpret these terms as they choose.

Besides, courts of law specialized in press and media law are non-existent. In Morocco, where trials of journalists are frequent, journalists have been calling for such specialized courts and judges. Journalists and

reporters are tried in penal courts where the Press Code and the 2004 Audiovisual Communication Law are used. For instance, in cases of defamation, journalists are assumed to have acted in bad faith. The penal court does not accept the claim that a journalist may have committed a professional mistake.

Another law that applies to both offline and online media is the Anti-Terrorism Act. It was passed in 2003, after the 16 May 2003 terrorist attacks in Casablanca.[129] This law gives the government sweeping legal powers to filter and delete content that is deemed to "disrupt public order by intimidation, force, violence, fear or terror."[130] There are no specific provisions about protecting journalists; all provisions are content-related.

In 2009, parliament launched a national forum fordialogue entitled"Media and Society" as a result of the recent tensions between the media and authorities over press freedom in print and online. The forum is meant to develop a road map for developing traditional and online media. The dialogue, which started on 1 March 2010, involves media representatives, members of parliament, political parties, the government, and the public. The forum constitutes a series of coordinated workshops, seminars and study days on a number of central key issues, including the local press, culture and information, women and information, professional training in the media sector, and youth and information.

The debate on the internet and media involves many social and political actors. All (11) political parties represented in the parliament, the Ministry of Communications, the National Union for Moroccan Press (*Le Syndicat national de la presse marocaine*, SNPM), the Moroccan Federation of Newspaper Publishers (*Fédération marocaine des éditeurs de journaux*), and HACA are debating ways to understand better the dynamics of online journalism (collection of news, treatment and distribution). The national debate coordinator Jamal Eddine Naji said the legal vacuum surrounding online publications must be filled to prevent problems such as the imprisonment of young internet users, especially bloggers. He urged participants to create a code for journalists that aligns the industry with the current realities of society and technology. Online journalists advanced the argument that the emerging electronic media need a comprehensive roadmap approach. Most online journalists argued that the government should provide them with funding, as is the case with print media. For them, the success of online media is heavily dependent on such funding at least at this critical period of its existence. Demanding financial support from the government, however, entails the risk of losing independence, as has proven to be the case with print media.

From a democratic perspective, the promotion of democratic values and the consolidation of the democratic process in Morocco is one of the main goals of this debate. Media should help to create a democratic culture as the only game in town by creating a public sphere where democracy is the sole legitimate way of practising politics.

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129. On 16 May 2003, Morocco was subject to the deadliest terrorist attacks in the country's history. Five explosions occurred within 30 minutes of each other, killing 43 people and injuring more than 100 in suicide bomb attacks in Morocco's largest city, Casablanca. Morocco has been a staunch ally of the United States. The 14 suicide bombers all originated from a poor suburban neighborhood in the outskirts of Casablanca.

130. Open Net Initiative, "Internet Filtering in Morocco."

7.1.2.2 Legal Liability for Internet Content

Legal liability for internet content rests with the author, the site, and the Internet Service Provider (ISP). The three ISPs are Maroc Telecom, Medi Telecom, and Wana. Moroccan ISPs have the obligation (via the Anti-Terrorism Act) to screen and filter the contents on the internet and must block infringing contents when aware of them. They bear joint liability with the internet site that must also filter and screen contents posted on their sites. The site owners are also legally liable for internet content. For example, if one user posts a comment on a newspaper site, and if the comment is deemed a threat to national security, both the author and the site are legally liable. In this particular context, the concern is not the unlawful contents (such as obscene or sexual material, or copyright violations) but public security and public order. In most cases, liability rests with the author and the site, but according to this law, ISPs are liable too in the event that they provide internet service to a site deemed a threat to national security.

7.2 Regulators

7.2.1 Changes in Content Regulation

No change has occurred in the past five years with regard to content regulation. The 2002 Press Code, the 2004 Audiovisual Communication Law, and the Anti-Terrorism Act provide the legal framework for media contents. No authorization or licenses are required from an organization or an individual to launch a website. But the legal censorship mechanism applied to all media activities has been extended to cover materials on the internet. As long as the internet was not directly challenging the government's hegemony, the use of the internet was generally tolerated. Morocco is among the few countries in the developing world that have resisted authoritarian temptations to censor digital content. Nevertheless, the *basis* for censorship is present, because the 2002 Press Code, the 2004 Audiovisual Communication Law, and the Anti-Terrorism Bill provide the legal framework for regulating media contents and for news delivery on the internet and mobile platforms.

7.2.2 Regulatory Independence

The print media are regulated by the Ministry of Communication via the provisions in the 2002 Press Code. The government is directly involved in regulating print media. The Press Code stipulates prison sentences for journalists and gives the government the right to shut down any publication "prejudicial to Islam, the monarchy, territorial integrity, or public order."

For broadcasting, HACA was established under the *Dahir* (Royal Decree) of 31 August 2002. It was established as an independent administrative body in charge of regulating audiovisual communication. However, a closer look at this organization casts doubt on its self-proclaimed independence from the government. HACA consists of the nine-member Higher Council of the Audiovisual Communication, five of whom are appointed by the King, including the president. The prime minister appoints two members, and the last two members are named by the presidents of the two Chambers of the Parliament. The Council has three major missions, as follows.

- **Advice:** to the King, the prime minister and government, and both chambers of parliament on issues related to the audiovisual sector.

- **Regulation:** authorizes the creation of audiovisual companies, and grants licenses to use radio frequencies.

- **Control:** monitors the compliance with the laws and regulations applicable to the audiovisual sector, compliance with pluralism (in particular concerning political party access), and compliance with advertising legislation and regulation.

HACA also consists of the General Directorate of Audiovisual Communication (*Direction Général de la Communication Audiovisuelle*, DGCA), which is run by the HACA's general director and represents HACA's administrative and technical services. The DGCA includes the following services: research and development, program monitoring, technical infrastructure, and the legal department.

There are no mechanisms of regulatory independence from government. Both the Press Code and the Audiovisual Communication Law are under the control of government institutions.

7.2.3   Digital Licensing

As Morocco has not yet embarked on the process of digital switch-over, issues of fairness and transparency have not been subject to national debate. The issues of importance are legal reforms for the media sector by defining the responsibilities of the government and the press and by supporting the press's viability.

7.2.4   Role of Self-regulatory Mechanisms

The government and the news media have not yet established a code of ethics or industry-wide self-regulatory bodies such as press councils to set up standards of accountability. The concept of "media ombudsman" does not yet exist.

7.3   Government Interference

7.3.1   The Market

The DTT service that the Ministry of Communication launched to allow households to receive digital broadcasting signals was subsidized by the government. DTT TV carries government-controlled TV stations that support the government. This initiative used tax money to manipulate the media market by boosting access to government-sanctioned news and information for Moroccan households. Since 1987 the government has followed the policy of giving a fixed subsidy to newspapers and magazines that support its official versions of political reality (see *section 6.2.1*).

7.3.2   The Regulator

HACA granted the first TV and radio licenses exclusively to government-owned TV and radio stations except Medi 1 TV. These stations consisted of thematic TV channels such as Arriyadia for sports, Assadissa for

religion, and many regional radio stations. The government made it hard for other private investors to create channels with the same themes or regional focus. In 2008, five TV license applications were refused by HACA on grounds of "the deteriorating situation in the advertising market."[131] The second wave of licenses granted by HACA on 23 February 2009 proved to be a disappointment for many observers in terms of enhancing pluralism in broadcast media.[132] HACA granted licenses to only four new radio stations that were regional and thematic; bids for news radiostations and privately-owned TV stations were not granted licenses. There is a pattern of government control of broadcast media that began with independence and continues to this day.

7.3.3   Other Forms of Interference

It is important first to describe, albeit briefly, the current political environment for a better understanding of government intervention in media freedom. The current political environment is certainly more open and conducive to greater freedom than during the reign of Hassan II (1961–1999) or the so-called "years of lead". Mohammed VI's reign has so far been more democratic in form and substance. Many taboos have been broken. Journalists now denounce corruption, and some have called for the resignation of many powerful government and army personalities, something that was inconceivable during the reign of Hassan II. The last decade witnessed an unprecedented opening-up of the political system. Ahmed Benchemsi, chief editor of two leading and provocative newsmagazines (*Telquel* and *Nichane*), criticized the communication skills of King Mohammed VI in an editorial. He also published the salary and expenses of the King in one of his reports in December 2004. None of these acts triggered an official reaction. In 2006, many newspapers, magazines, and even the public TVs and radios published reports on the arrest of the chief of security of the royal palaces about his alleged connections to a drug lord. No journalist would ever have dreamt or imagined publishing such sensitive information during the reign of Hassan II without some daunting consequences. However, the government still interferes with the content of the media in ways that do not serve the country's democratic transition and its image abroad. (See *section 1.4.2.*)

Freedom House rated Morocco in 2009 as "partly free". Morocco fared relatively well on the criterion of laws and regulations that influence media content. But on the criteria of political pressures and economic influences over media content, Morocco rated poorly. To conclude, although the country has seen a significant political opening-up during the last two decades, it registered some regression and setbacks in both media freedom and human rights since 2007.

According to RSF and the Committee to Protect Journalists (CPJ), actions of Moroccan officials against freedom of the press have increased. In 2005, there were a record number of cases brought to court by individuals or the public prosecutor against journalists and media outlets. The public prosecutor filed 31 complaints against 17 different publications. The charges ranged from defamation, to insulting a foreign head of government, undermining public order, and publishing false information and unauthorized photographs of the royal family.[133]

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131. HACA, *Rapport surl'attribution,*available at http://www.haca.ma/pdf/Rapport%20G2%20MEP.pdf (accessed 9 June 2010).

132. *RSF*, "Morocco".

133. *RSF*, "Morocco".

One blatant case of government harassment of the media was in 2006 when *Le Journal Hebdomadaire* published a report on the controversial Danish cartoons of the Prophet Mohammed. Although the magazine inked out the cartoons, the government staged a protest in front of the magazine where local government vehicles were used to transport the protesters, most of whom were government employees. The two state-owned TV stations, Al Oula and 2M, reported on the event and accused the magazine of violating the sacred values of Moroccans.[134] They also aired an interview with Omar Sayed, lead singer of the legendary pop music group Nass El Ghiwan, in which he expressed his disapproval of the cartoons. He confirmed later on that he was responding to a question about the cartoons and not about their publication by the magazine. The two TV stations inserted the interview in their reports and made Sayed seem as if he was commenting on the protests against *Le Journal*.[135]

Some Moroccan cyber-activists created a Facebook page to criticize the nepotism and the misuse of power of Prime Minister Abbas al-Fassi and his entourage, called the "All against the Prime Minister's family" Movement: some 20,000 Facebookers joined this group. These Facebookers planned a demonstration in front of the parliament building. For some reason the demonstration did not happen. The Al-Fassi family created a Facebook page to polish its image. Facebook was forced by the government to delete the Facebook page that criticized the Al-Fassi family without deleting the page that defended the family.

With regard to online publications, the regime reacted by arresting some of the most provocative Web 0.2 activists (see *section 3.2.1*).

Moroccan e-journalists, bloggers, and e-writers are organizing themselves to advocate for their rights and freedoms under the umbrella of the National Moroccan E-press Syndicate, yet others regard this union as a new and subtle way for the regime to control their online activism, granted the inherently independent nature of online journalism.

7.4   Assessments

Morocco's strategy for digital communication was set out in a document called "Digital Morocco 2013".[136] The primary goal is to situate Morocco as a technology hub in North Africa by providing broadband and high-speed internet access at a national level by the end of 2013. The strategy also set other objectives such as e-administration, e-service, and e-governance, to serve businesses and citizens alike. Regarding the economy, "Digital Morocco 2013" aims to encourage small and medium-sized enterprises to adopt information and communication technologies to leapfrog ahead in the service-oriented economy.

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134. CPJ,"The Moroccan Façade," available at http://cpj.org/reports/2007/07/moroccoweb.php (accessed 15 November 2010) (hereafter CPJ, "Moroccan Façade").

135. *Le Journal Hebdomadaire,* "Quand l'état appelle à la haine," 18–24 February 2006, p. 31.

136. Ministry of Industry, Trade and New Technologies, *Digital Morocco 2013. The National Strategy for Information Society and Digital Economy*, 2008. Available at http://www.septi.gov.ma/Fiche_pdf/MarocNumeric2013/MarocNumeric2013_Eng.pdf (accessed 23 February 2011).

However, the overall framework of policy and law is not yet adequate to the challenges of traditional media, let alone digitization, as shown by the failure of two public policymaking consultations to adopt a new press code (see *sections 4.1.1* and *7.1.2.1*).

Ahmed Benchemsi says that working as a journalist in Morocco is like walking across a minefield. Journalists write their stories and do their investigative reporting on sensitive issues, and like mines these sensitive issues sometimes blow up. *Nichane* published a report on Moroccan popular jokes, and the two journalists responsible for the report were sued and the entire magazine edition was seized from the newsstands by the government. While the first critique was a mine that could have blown up but did not, the second sensitive story was a mine that did explode.

The government uses financial pressure to push the most outspoken media into closure or bankruptcy. The 2007 CPJ report states that there are unmistakable disparities between independent and pro-government publications in terms of advertising revenue. Pro-government newspapers such as *Aujourd'hui le Maroc* and *Le Matin* are "flush with pages of advertising."[137]

The degree of government interference has not changed over the past five years. It continues to be unpredictable and inconsistent.

The legal and regulatory framework of broadcasting does seem to encourage diversity of news and information output. Audiovisual liberalization aims to encourage private-sector investment and therefore to allow new independent media outlets to exist. However, laws, policies, and regulations do not reflect the real situation or character of the media. They do not reveal, for instance, the details of who gets licenses to operate, and who decides what on the news contents and why. Media policy tends to imply that the media are freer than they really are.

An examination of the legal environment shows that the principles of freedom of expression, diversity, and pluralism underlie all Morocco's media laws and policies. However, the government controls the licensing, production, and distribution of broadcast media. Given the high rate of illiteracy, TV and radio are the main sources of news and information for most Moroccans and they are considered as the most powerful media. Radio and television reach beyond the borders of literacy and geography. Print media, on the other hand, can only be used to reach the educated elite; as it cannot reach millions of Moroccans, it presents only a limited political threat.

For its part, the government believes that radio and television are too important to be left to private persons. Although there has been some progress with radio licensing which led to an increase in pluralism and diversity, the second wave of licenses granted by HACA on 23 February 2009, especially with regard to television, shows the extent to which the legal and regulatory framework, being subject to government interference, does not fully enhance pluralism in broadcast media.

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137. CPJ, "Moroccan Façade."

8. Conclusions

8.1   Media Today

Overall, the contribution of new digital media to the news and information offer is substantial, but the impact of this contribution on the average Moroccan remains minimal. Internet access and use are currently limited to urban areas and to educated urban segments of Morocco's population. Rural areas constitute 37.1 percent of the country and many have access to electricity and can therefore access television and radio but most do not have access to phone lines and the internet.

News updates, audio and video streaming, availability of images, iReporting are all new valuable sources of information that online portals are using to enrich their news and information outputs. Internet users have demonstrated intensive use of YouTube to aggregate and collect user-generated reports of riots and police violence against students, labor unions, and other activists. These grassroots journalists have on many occasions broken the news of many incidents to mainstream media.

Digitization has both a positive and a negative impact on the quality and accuracy of journalists' reporting. On the one hand, digitization has opened the gates for news and information to flow with a speed and efficiency never seen before. Social media triggered a revival of the watchdog function of the media and paved the way for it to act as the fourth estate in controlling the misconduct of the political regime. On the other hand, bad practice in news reporting that existed before digital media got worse. Data theft and plagiarism, reporting unverified information, relying on few unnamed sources, and presenting opinions as facts are routine activities journalists continued to engage in, and digital media made such unethical practices even easier to uphold.

Considering the lack of information about user numbers, it is difficult to conclude if interactivity in local contents is a factor of success. Moroccan youth and the educated elite seem to follow world trends in interactivity, ignoring local services and contents that they consider to be poor quality. They tend to use international state-of-the-art services. As anywhere else, Google, Facebook, YouTube, MSN chats, and Wikipedia have the highest reach among users.

The major improvements in terms of pluralism and diversity are not related to digitization. They are due to the new political environment and the democratization process under King Mohammed VI. (But note the regression in press freedom in the past five years; see *sections 1.4.2, 7.3.3* and *7.4.2*). The liberalization of the audiovisual sector, triggered by the creation of HACA and the new Audiovisual Communication Law of 2004, has allowed new private radio stations and new TV stations to emerge.

The main changes in the work of journalists have been triggered by the new audiovisual liberalization, the rise of independent print media, and the new relatively open political environment. These factors are not digitization-related. Journalism faces more fundamental challenges related to the profession itself, regardless of digitization.

8.1.1   Positive Developments

- **Growth in mobile phone penetration:** the number of subscribers to mobile phones reached 27 million by March 2010. The potential of mobile phones as carriers of news and information has not been fully exploited.

- **Bridging the digital divide:** many policymakers are aware of the digital divide, and believe that universal access is a goal the government ought to pursue. ANRT initiated the GENIE (2005) and PACTE (2008) projects. These projects aim to generalize the usage of ICT among all segments of the population. In October 2009, the government launched the national strategy "*Maroc Numérique* 2013" (Digital Morocco 2013).

- **New digital platforms:** the content providers (print, TV, and radio) continue to use their old media platforms while providing the same contents in the new digital platforms. Others such as Menara.ma, Hespress.com, Biladi.ma, Yabilady.com, and emarrakech.info are all online publications with no offline versions.

- **Pluralism and diversity:** new entrants in the news and information sector are private commercial radios and the independent press. The new private radio stations created room for national debates by offering a space for a diverse range of voices. The emerging private print press also became considerably diversified and relatively competitive.

8.1.2   Negative Developments

- **Partial migration to digital transmission:** Morocco has not yet embarked on digital switch-over. A partial migration to digital transmission took place and there are new digital platforms for providing news and information, but full migration to digital transmission has not happened. Most households are not equipped to access content provided by digital media, but recent developments in the telecoms sector show that this situation will change in the near future.

- **Regulation of digital switch-over:** there is no legal framework yet for digital switch-over. There are no provisions yet that specify access (to signal carriers and multiplexes) and affordability requirements that must be met before the analog signal can be switched off. The allocation and regulation of white spaces and digital dividend by the ANRT have not taken place.

- **Regulation of media content:** no change has occurred in the past five years. The 2002 Press Code, the 2004 Audiovisual Communication Law, and the Anti-Terrorism Act provide the legal framework for media contents and for news delivery on the internet and mobile platforms. The internet legal cases discussed in *section 3. 2. 1* were handled using the 2002 Press Code.

- **Media ownership:** the government is the only monopoly in terms of media ownership. It has control over radio and television and their online platforms. It also exercises significant influence on political party newspapers and has a legal and economic arsenal to control and manage the competition. The government uses financial pressure to push the most outspoken media to close down or go bankrupt.

8.2   Media Tomorrow

In a media environment that is changing rapidly, any attempts to predict the future of digital media must be cautious. However, it is clear that the media industry has a modest potential for development over the coming five years.

The media actors, structures, institutions, and consumption are in a constant process of change and new patterns of control. Two Cs are central to understanding the future of digital media: *change* and *control*. Change is obvious and control is tight. Media use will continue to change through digitization, personalization, customization, and narrowcasting. Like other countries, digitization of content will likely alter the Moroccan media landscape. The mainstream media have been adapting and adjusting to the effects of new communication technologies, moving steadily towards greater innovation. The news industry has begun to explore new directions such as combining internet and mobile communications networks and platforms to produce online newspapers and magazines.

The second variable that will affect the future digital media is control. The government's use of implicit and explicit administrative and bureaucratic mechanisms of maneuvering, oversight, and control will continue to play a key part in media evolution. The immense possibilities of digital communication have challenged the scope and capacity of the current government media policies. Consequently, both the Press Code and the Audiovisual Communication Law are likely to be further reformed to reflect the ongoing democratization process.

Over the next five years, given the rate of illiteracy, the use of digital media will be limited, by and large, to educated Moroccans in urban centers. While the general public will still depend on the two public service TV stations, Al Oula and 2M, for news and information, the internet as a medium for news and information will continue to mature. Mobile phones have the potential to deliver media content to illiterate audiences and can therefore help overcome the problem of access to news and information. The future of the media might lie in the realm of mobile multi-media.

Young Moroccans now use the internet not only for entertainment but also for news and information. Personal online news and information are in vogue. Self-interested personal information will be consumed as

news. Digital media will make personal news more appealing and attractive and political news less appealing to young Moroccans. Political debate is not among their primary interests. Citizen journalists are aggravating this trend, since the blogosphere is apolitical and will remain so over the coming years.

Commercial radio stations will continue to thrive and enrich the audiovisual sector. Some of them are contributing to the development of an argumentative culture that supports the emergence of a dynamic public sphere. In recent times, intellectuals, activists, politicians, and journalists have debated a number of national issues that pertain to politics, culture, and religion. The emerging private print media have become diversified and relatively competitive. Under the combined impact of globalization, information, and communication technologies, print media will gradually develop into professional print media.

In the context of the rise of the internet and mobile phones, the media will undergo a very particular process that can be described as the marginalization of mainstream media, the mainstreaming of marginal media, meaning that citizen journalists, bloggers, and social media communicators will receive attention and audiences, whereas the very impact of the mainstream and conventional media will likely be constrained and have limited societal effects.

9. Recommendations

9.1 Policy

9.1.1 Media Policy

9.1.1.1 Legal Reform

Issue

The internet has made it impossible for government to control the flow of information. Technological developments and policies increase pressure on the government to such an extent that the adoption of a new media law, adapted to the current realities, has become necessary.

The 2011 constitution stipulates that civil society should participate in drafting media regulation. There is a legal vacuum around the internet and a new legal framework is needed to encourage investment in the internet, including the establishment of online radio and television.

Recommendation

The Ministry of Communication and the High Commission for Audiovisual Communication (*Haut Autorité de la Communication Audiovisuelle*, HACA), in cooperation with civil society and other partners such as the National Trade Unions of the Moroccan Press and the Moroccan Federation of Newspaper Publishers, should review the Press Code as well as the Law on Audiovisual Communications, in order to eliminate provisions stipulating prison sentences for journalists, clearly guarantee access to and free use of information, and ease the conditions for investing in online media. In addition, professional journalists in both traditional and online media should adopt a code of ethics and representative, self-regulatory bodies such as a press council.

9.1.2 Independence of Media Regulators

Issue

The legal and regulatory framework for broadcasting was created to encourage investment in the private sector and thus allow new independent media to emerge. Current regulatory practices do not, however, encourage diversity of news and information output.

The 2011 constitution stipulates that civil society should participate in drafting media regulation. There is a legal vacuum around the internet and a new legal framework is needed to encourage investment in the internet, including the establishment of online radio and television.

Recommendation

The legal authority of HACA lies in its independence. In the light of unrestricted access to information made possible by the new media, it is necessary for the parliament to review both the license conditions of broadcasters and the appointment criteria and powers of the HACA; civil society organizations should be consulted as part of the decision-making process.

The weight of the two chambers of parliament in nominating the members of HACA should be increased. Also, civil society organizations should have the right to nominate one or two members. The appointment process and the criteria of nomination should be a matter of public debate.

9.2　Public Service in the Media

9.2.1　Regionalization of Public Service Television

Issue

Digitization has exposed the failure of public service stations Al Oula and 2M to address the concerns of regional audiences by providing programs in dialect and about local cultures.

Recommendations

The HACA should introduce regulations to enhance regional coverage on Al Oula and 2M, taking particular consideration of Morocco's geographical, ethnic, cultural, and dialectal diversity. Al Oula and 2M should, for their part, reconsider the manner in which they interact with viewers by covering more citizen-related issues, adopting the best technological innovations, and generally adopting the politically neutral approach that should characterize public service broadcasting.

9.2.2　Access to Information

Issue

Government institutions at the local level (governors' offices, mayor's offices, and other local authority offices) rarely communicate their activities to the media, and therefore to citizens.

Recommendation

The institutions of local government should create public relations offices that can make their administrations open and accountable to the media. These institutions should ensure that appropriate staff are trained in public relations. The Ministry of the Interior, which coordinates municipalities, should adopt a similar policy at central level.

Article 27 of the Constitution, enshrining free access to information, lacks an adequate legal framework. The Article 27 states that citizens have the right to access information held by the government, elected institutions and all public service institutions. Government websites should include search engines so that all information is accessible. Local institutions should develop a social networking site, like Twitter, which allows citizens (including the deaf and hearing-impaired) to keep informed about administration-related issues such as budget, audits, contracts, and taxes. Public archives should be digitized and made available to the public.

9.3 Journalism

9.3.1 Improving Journalists' Working Conditions

Issue

Most journalists working for print media and private radio stations do not have employment contracts, health insurance, or pensions. A relatively large number of well-trained media professionals have been lost in recent years to the rich Gulf media institutions such as Al Jazeera, the Abu Dhabi Media Company, and Al Arabiya.

Recommendation

The Ministry of Communication and the Ministry of Labor should enforce labor laws in the journalism sector, obliging media owners to offer employment contracts, health insurance, and retirement benefits.

9.3.2 Official Recognition of e-Journalists

Issue

Moroccan e-journalists are still too few in number to act as levers of social change. Morocco has now only 24 officially recognized e-journalists.

Recommendation

The Ministry of Communication should recognize e-journalism as a legitimate profession to allow its practitioners access to financial resources and privileges that would facilitate investigative work.

9.4 Digital Media Literacy

9.4.1 Creation of a Research Center

Issue

Under the combined impact of telecoms liberalization, deregulation, and privatization, the recent opening of the political system, and the legal and technological modernization of Moroccan broadcasting media,

a dynamically growing media market has emerged. At present, there is no national research center that routinely and systematically studies and evaluates these transformations.

Recommendation

The government should earmark funding for the creation of a national research center that would systematically study and evaluate the changes in Moroccan broadcasting. This center would benefit scholars, professionals, activists, and policy-makers. Topics to be addressed should include the following: the relationship between media and democracy; content analysis; media impact on culture and society in general and on younger viewers in particular; audience ratings and analysis; and investigative journalism.

List of Abbreviations, Figures, Tables, Companies

Abbreviations

ADSL	Asymmetric Digital Subscriber Line
ANAPEC	National Agency for the Promotion of Work and Skills
ANRT	National Agency for the Regulation of Telecommunications, *Agence Nationale de Réglementation des Télécommunications*
CPJ	Committee to Protect Journalists, *Le Comité pour la Protection des Journalistes*
DGCA	General Directorate of Audiovisual Communication,*Direction Général de la Communication Audiovisuelle*
DTT	Digital Terrestrial TV, *Télévision Numérique Terrestre* TNT
EIU	Economist Intelligence Unit
EU	European Union
GDP	Gross Domestic Product
GENIE	Generalization of ICTs in Education, *Généralisation des TIC dans l'Enseignement*
HACA	High Commission for Audiovisual Communication, *Haut Autorité de la Communication Audiovisuelle*
IDI	ICT Development Index
IMF	International Monetary Fund
INDH	National Initiative for Human Development, *Initiative Nationale pour le DéveloppementHumain*
IPTV	Internet Protocol Television
IRCAM	Royal Institute of Amazigh Culture, *Institut Royal de la Culture Amazighe*
ISIC	*L'InstitutSupérieur de l'Information et de la Communication.* The High Institute of Information and Communication
ISP	Internet Service Provider
ITU	International Telecommunication Union
IP	Internet Protocol

MALI	Alternative Movement for Individual Liberties, *Mouvement Alternatif pour les Libertés Individuelles*
MAP	Maghreb ArabPress
MDG	Millennium Development Goals
NGO	non-governmental organization
OJD	Audit Bureau of Circulations, *Organisme de Justification de la Diffusion*
ONA	*Ominum Nord Afrique*
ONI	Open Net Initiative
PACTE	Program of Generalized Access to Telecommunications, *Programme d'Accès Généralisé aux Télécommunications*
RSF	Reporters Without Borders, *Reporters sans Frontières*
RTM	Moroccan Radio and Television, *Radio diffusion et Télévision Marocaine*
SMS	Short Message Service
SNRT	National Radio and TelevisionCompany, *Société Nationale de Radiodiffusion et de Télévision,*
UGC	User-generated Contents
USAID	United States Agency for International Development
VoIP	Voice over Internet Protocol

Figures

Tables

Companies

Maroc Telecom (*Ittissalat Al Maghrib,* IAM)
Maroc Connect
Medi TelecomOminum North Africa (ONA)
Telefonica
WANA

Mapping Digital Media: Country Reports (published in English)

1. Romania

2. Thailand

3. Mexico

Mapping Digital Media is a project of the **Open Society Media Program** and the **Open Society Information Program.**

Open Society Media Program

The Media Program works globally to support independent and professional media as crucial players for informing citizens and allowing for their democratic participation in debate. The program provides operational and developmental support to independent media outlets and networks around the world, proposes engaging media policies, and engages in efforts towards improving media laws and creating an enabling legal environment for good, brave and enterprising journalism to flourish. In order to promote transparency and accountability, and tackle issues of organized crime and corruption the Program also fosters quality investigative journalism.

Open Society Information Program

The Open Society Information Program works to increase public access to knowledge, facilitate civil society communication, and protect civil liberties and the freedom to communicate in the digital environment. The Program pays particular attention to the information needs of disadvantaged groups and people in less developed parts of the world. The Program also uses new tools and techniques to empower civil society groups in their various international, national, and local efforts to promote open society.

Open Society Foundations

The Open Society Foundations work to build vibrant and tolerant democracies whose governments are accountable to their citizens. Working with local communities in more than 70 countries, the Open Society Foundations support justice and human rights, freedom of expression, and access to public health and education.

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