

Morocco

Azur Sky Thinking

Morocco might be a strict Islamic country, but it's also an African state that tolerates gambling. There are seven casinos in four cities plus poker and three monopoly companies, which operate the national lottery, sports betting and horse racing industries.

Legal regulation of gambling in Morocco really began in 2002 when the Prime Minister signed a decree which meant casinos could operate legally. But with 90 per cent of the population Islamists the idea of gambling is still not embraced fully by residents.

In 2012 the Moroccan Minister of Telecommunications Mustafa al-Khalfim began a campaign to introduce a ban against the advertising and the promotion of gambling via audiovisual media. He criticised the popularity of TV programmes with live gambling and called for a law to ban such programmes.

Apparently there were around 900,000 viewers on one day which Khalfi claimed was having a negative impact on the younger generation.

Gambling has always been a contentious issue and Khalfi even threatened his resignation if the law to ban live gambling on state owned media wasn't passed. Although some forms of gambling are driven by tourism, statistics show around three million Moroccans also partake in some kind of gambling whilst the industry generates almost DS2.9bn for the state treasury.

A decree was eventually issued which meant all lottery and gambling advertisements were to be banned from both public and private radio and television broadcasts.

The operators have since taken their promotions online with their own YouTube channels and social media sites such as Facebook and gambling is still big business in Morocco nonetheless. In fact the number of Moroccans who enjoy a bet rose by five per cent in 2016 despite the government ban on advertising.

The alcohol, tobacco and gaming sectors were expected to generate more than MAD11bn in taxes last year, whilst some MAD190m was due in terms of taxation from games of chance alone.

THE GAMBLING SECTORS

Morocco has three main gambling monopolies plus seven casinos. The activity is monitored by a mixed model of public and private companies via three ministries – Economy and Finance, Youth and Sport and Agriculture.

Since 2013 the gambling market has grown by



around one third and in 2016 total betting turnover for the sector (not including the casinos) was MAD9.4bn (US\$941m) an increase of 6.6 per cent on the year previously.

The dominant betting activity is at the racetrack where the Royal Society for Horse Encouragement (SOREC) enjoys a betting monopoly. SOREC has around 30 branches and an additional 500 points of sale via partnerships and saw a betting turnover of MAD6.4bn (a rise of three per cent) giving it a 70 per cent market share (not including casinos).

In 2016 SOREC launched a mobile data app to keep players informed of Moroccan and French racing info.

Meanwhile sports betting and instant lotteries are the sole responsibility of the Moroccan Games and Sports (MDJS). Turnover in 2017 was MAD2.44bn which is a growth of 167 per cent since 2013.

MDJS was founded in 1962 and is a limited company under state control. It holds the concession of the monopoly to organise sports



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betting games in Morocco plus raffles, lottery games and instant games.

The Loterie Nationale (SGLN) is a private limited company under state control in charge of the operation of national lottery game.

MDJS has a 78 per cent lottery market share whilst SGLN has 22 per cent. Both the lotteries have operated as complementary companies and share a distribution of around 1,500 points of sales.

TOURISM GROWTH

Morocco gained independence from France in 1956 and King Mohammed V became monarch. He was succeeded in 1961 by King Hassan II who contributed the most to shaping modern Morocco. The current King Mohammed VI came to the throne in 1999 on the death of his father King Hassan II.

Prime Minister Saad Eddine al-Othmani, heads the Justice and Development Party (PID) – a moderate Islamist party which leads a fragile six party governing coalition formed in 2017.

Despite the adoption of a new constitution in 2011 there is still call for changes in Morocco. Economic policy is focused on developing faster growth and reducing unemployment, poverty and illiteracy.

Morocco is the fifth largest African economy by GDP and since 1993 has followed a policy of privatisation of certain sectors. The telecommunications sectors saw a 35 per cent privatisation of state operator Maroc Telecom whilst liberalising rules for oil and gas exploration saw concessions for many public services in major cities.

The services sector makes up half of Moroccan GDP mostly consisting of mining, construction

and manufacturing. Major resources for the economy include agriculture, phosphate minerals and tourism. Morocco is the third largest producer in the world of phosphates.

Economic growth has been erratic and relatively slow mainly due to an over reliance on the agricultural sectors which, being susceptible to rainfall, ranges from 13 to 20 per cent of GDP. Droughts have a severe knock on effect as 36 per cent of the Moroccan population depend on agricultural production.

Despite Morocco's economic progress it suffers from high unemployment (10.2 per cent), poverty and illiteracy especially in rural areas. Some 15 per cent of the population live below the poverty line. GDP per capita in 2017 was \$8,600 and real growth rate is around 2.5 per cent.

The highest population density is along the

Essential information and facts about Morocco:

Capital	Rabat
Total Area	446,550 sq.km
Population	34,314,130
Median age	29.7 years
Religion	Muslim (99%)
Ethnic Groups	Arab-Berber (99%)
Languages	Arabic (official), Berber languages and French
Currency	Dirhams (MAD)
Government type	Parliamentary Constitutional Monarchy
Chief of State	King Mohammed VI (since 1999)
Head of Government	Prime Minister Saad-Eddine al-Othmani (since 2017) PDJ
Elections	Monarch is hereditary. Prime Minister appointed by Monarch from the majority party following elections.
Unemployment	10 per cent
Tourism	The number of visitors to Morocco per year -12.2 million



In 2001 the Plan Azur was launched – a large scale project initiated by King Mohammed VI aimed at internationalising Morocco. The aim was to increase the number of tourists from four million in 2001 to 10 million by 2010. The plan was to also create six coastal resorts for holiday home owners and tourists, five on the Atlantic coast and one on the Mediterranean – Mediterranean Saidia (Berkane), Mazagan Beach Resort (El Jadida), Mogador Essaouira, Port Lixus (Larache), Taghazout Bay (Agadir) and White Beach (Guelmim). The plan also included upgrading airports and adding new train and road links.

Atlantic and Mediterranean coastlines with around 3.6 million inhabitants in Casablanca, 1.8 million in Rabat and 1.1 million in Tangier.

Tourism is a steady growth sector and Morocco is becoming one of the world's most sought after tourism destinations and is the top hot spot in all of Africa. There was a big investment in this sector back in the 1970s and since the 1990s tourism has become Morocco's largest source of foreign currency.

Morocco has a 1,835km sea border with the Atlantic Ocean and Mediterranean Sea and 2,362km of land boundaries with Algeria and the Western Sahara and Spanish enclaves Ceuta and Melilla.

Back in 2008 there were around eight million tourists with total receipts of \$7.55bn. Last year there were over 12.2 million tourists (compared to 9.2 million in South Africa). There's a wide range of accommodation from €20 per night up

to €300 per night from luxury level hotels to riads.

There are some 251,200 beds registered with the Ministry of Tourism, whilst three to five star hotels and club hotels account for almost 50 per cent of this number. Back in 2010 there were only 3,000 beds registered. Marrakech has a 30 per cent share of these beds whilst Agadir has 16 per cent followed by Casablanca with eight per cent.

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The project was to develop 160,000 beds plus 10 golf courses whilst attracting international groups to the country for development.

But the Plan Azur got off to a slow start mainly due to financing problems and waning interest from developers. Some 18 years after its launch it still hasn't been fully completed. Only Mazagan, Saidia and Taghazout have opened their doors. Essaouira and Larache are delayed and White Beach is a forgotten project.

The Plan Azur was renewed in the Ministry of Tourism's new updated Vision 2020 project. Vision 2020 was launched by the Moroccan government back in 2010 to make the country one of the top 20 tourist destinations in the



world and double the number of visitors and see tourism providing 20 per cent of GDP. Vision 2020 aims to strengthen Morocco's seaside resort industry on both coastlines and develop new destinations in the Souss and Sahara.

Released by the Department of Tourism, the plan aims to create unique, safe and affordable tourist experiences including reforms of the existing hotel ranking systems whilst increasing the number of tourism establishments. It also looks at developing eco resorts, green resorts and desert and luxury bivouac resorts.

Plan Azur has since been called a fiasco and today there are 11,000 beds in total across 17 hotels built – the majority in Saidia (eight hotels) and Taghazout (six hotels) at a cost of DH15bn.

CHANGES IN THE LOTTERY

Morocco has transformed its economy in recent years. Industry, trade and services are the three

main developed and solid national sectors which run alongside the more traditional agricultural sector.

It's become the preferred African destination for foreign investment. Italian car make Magneti Marelli is due to build a plant in Tangier for the production of automotive parts in a dedicated free zone whilst Renault has been present in Morocco in Dacia since 2012.

Recently Italy's Sisal Group also arrived in the country after winning a tender for the National Lottery Management Company (SGLN) for the games, distribution network and marketing of the products. This is the first foreign operation for Sisal and is down to the considerable growth shown by Morocco in terms of demography and wealth and represents a "gateway for Sisal to a huge market that is Africa."

The concession is also related to the supply, installation and maintenance of a new game

development system on behalf of the SGLN.

Since January 1 2019 Sisal has taken charge of the management and development of a games portfolio for lotteries, online games and virtual races.

Around 20 employees are already recruited by the Moroccan subsidiary based in Casablanca and in the longer term the company says some 50 employees will be operational.

The Loterie Nationale was introduced into Morocco in 1972 and is operated by the Société de Gestion de la Loterie Nationale (SGLN).

The lottery offers various draw games including Loto, Joker, Quatro, Keno, Toulati and Milliardo games plus pick 'n play and there is access online via its e-loterie.ma portal.

In mid 2017 the SGLN issued a Request for Proposal from lottery gaming system vendors

Reports

MOROCCO MARKET

LOTTERY
SGLN

LOTTERY RETAILERS
1,500

LOTTERY REVENUE
MAD603M

RACETRACKS
7

RACING REVENUE
MAD6.4BN

BETTING OPERATOR
MDJS

BETTING REVENUE
MAD2.2BN

CASINOS
7

TOTAL GGR:
MAD9.4BN (NOT CASINOS)

for a fully integrated computer gaming system to replace a system which had been operated by Intralot for the previous 10 years and whose contract expired at the end of last year.

Italy's Sisal Group, through its Moroccan subsidiary (Sisal Morocco), won the tender and now has a 10 year concession running until 2028. Since 1997 Sisal has been the sole licensee of SuperEnalotto and also manages SiVince Tutto, Win for Life, Eurojackpot and VinciCasa lotteries and is also active in the sports betting industry with Sisal MatchPoint.

There is now a transition period as Intralot withdraws from the lottery in Morocco to focus on sports betting (managed by the MDJS).

Sisal has an ambitious development plan and by 2028 says it will have doubled the turnover on the lottery market with its first year goal to achieve MAD900m and over MAD1bn by 2020. To do this the company plans to launch innovative new games of chance and expand the distribution network from 1,500 to 3,000 Points of Sale and increase the return to players from 50 to 70 per cent.

Sisal has already invested some MAD110m (€10m) into technology and Human resources in Morocco.

Marco Caccavale, lottery director at Sisal Group said: "We have been involved since January 2019 in the management and the development of a complete portfolio of games that will include, among other things, lottery games, but also in instant lotteries, virtual races, online games and interactive lottery machines. We are particularly





proud to have won this tender which, for us, is both important and ambitious. We therefore advocate a responsible and innovative approach through which we will contribute to the growth of all local communities but also of all stakeholders."

Intralot Maroc SA was founded in 2010 with 100 per cent of shares held by Intralot SA. It supported the operation of all games of Morocco's two lotteries – MDJS and SGLN.

Intralot Maroc ran the operation of all the games including risk management of fixed odds sports betting, instant tickets and provided additional services such as marketing, maintenance and promotions.

Intralot's contract with SGLN expired in December 2018 and the MDJS contract will expire in December 2019.

Gaming revenues for Intralot Maroc in 2017 was €22.5m compared to €20.3m the year before. The drive behind the growth was attributed to the uplift in sports betting revenue plus the increased focus on fast draw games and introduction of virtual games and re-launch of Keno.

Intralot Maroc says the Moroccan market was responsible for 3.3 per cent EBITDA in 2017 and EBITDA was €6.5m.

television although the company has continued to grow under a de facto TV ban.

Last year a tender for the operation of games for MDJS was opened with a deadline of April 2019.

The creation of the National Sports Development Fund aims to help the state finance the sports sector and the MDJS is a major provider of this fund. MDJS's mission is to contribute to the financing of the National Sport Development Fund (FNDS) to which it gives back all its profits. The FNDS was created in 1987 and is managed by the Ministry of Youth and Sport

Meanwhile although online gambling via other sites is forbidden players do access foreign online gambling sites most of which offer their sites in Arabic, French or English whilst bets are accepted in Dirhams or American dollars.

There is no licensing procedure for online casinos and the only legal form of gambling at the moment are sports lotteries available via MDJS and the SGLN. The MDJS site offers online lottery games and sports betting. It does not offer casino games.

HORSE RACING

SOREC – Royal Society of Horse Encouragement – was created in 2003 under the Ministry of Agriculture and Maritime Fishing to promote the horse racing sector. The group is responsible for

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SPORTS BETTING

Sports, particularly football, are very popular in Morocco and the Moroccan football team was the first from Africa to reach the second round of a World Cup back in 1986.

It was scheduled to host the 2015 Africa Cup of Nations tournament but the government refused to host the event, due to a fear of an ebola outbreak.

Sports betting is conducted by the Marocaine des Jeux des Sports (MDJS) is a public limited company with 90 per cent of the shares held by the treasury and the remainder held by the Caisse de Depot et de Gestion.

Sports betting products include TotoFoot, TotoFoot12 and Cote&Sport plus there are several instant games and Chrono (Clock).

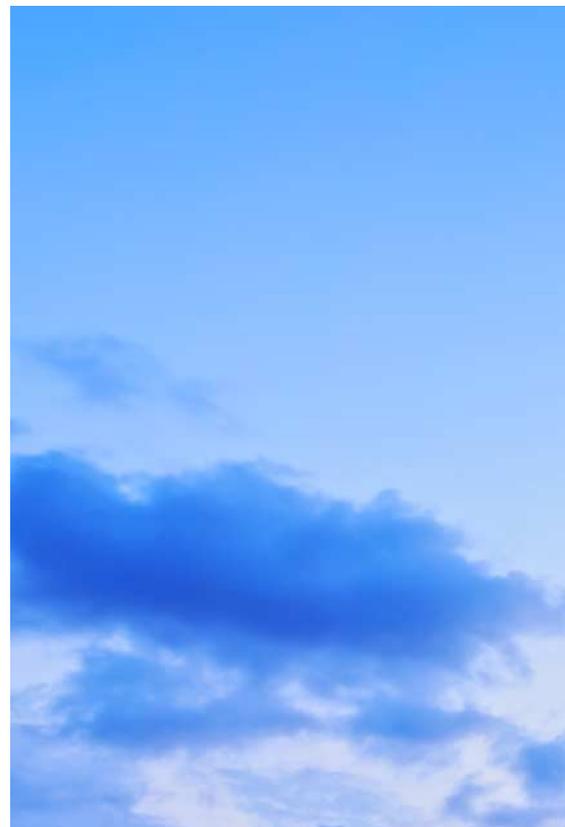
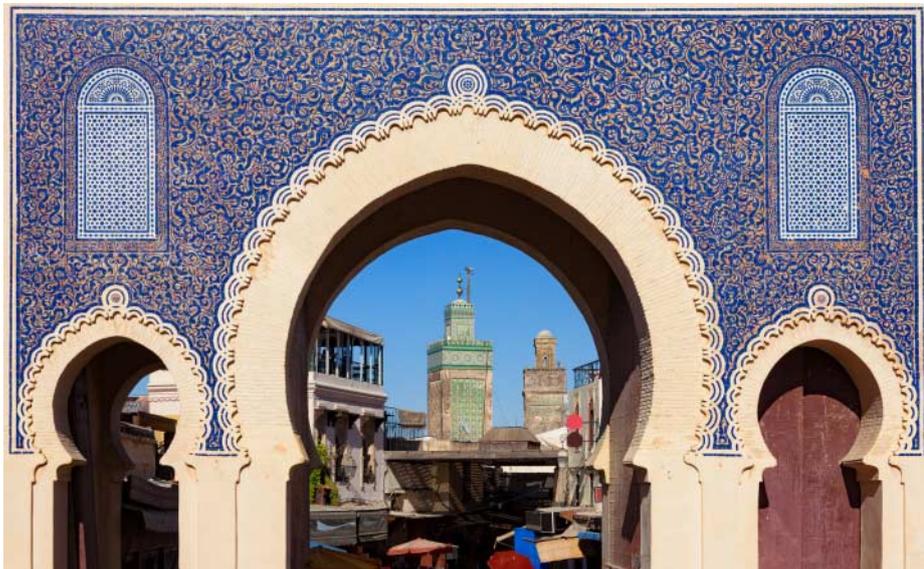
Since 2012 the ban on advertising gambling meant MDJS could no longer promote its games, mainly Chrono and Grattez&Gagnez, on the

the supervision of breeding, the organisation of race tracks and management of horse racing events.

The first horse racing tracks were opened back in 1914 and the horse is strongly linked to the history of the Moroccans via their Berber and Arab ancestry. The first equine breed in North Africa is the Barbes (Beard) whilst the Arabs introduced the Arabian horses. Apparently Morocco is second in the world after Turkey for the number of purebred Arabian horse races held annually.

SOREC organises more than 2,000 races each year at seven racecourses, of which 700 are for purebred Arabians. Some 90 per cent of Arabian horses are bred in Morocco which currently has around 3,000 horses and 1,000 owners.

On average there are six meets per week plus there are nine national Grand Prix events and two international events – the International Meeting of Morocco and the UAE Abu Dhabi



Marrakech makes around 30 per cent of its GDP from tourism and is ranked second (just behind Cancun in Mexico) as a favourite destination for Americans. Last year some 1.2 million tourists arrived through the Menara Airport between January and July alone and accommodation establishments recorded 4.7 billion over night stays. There are over 76,000 beds registered in Marrakech. In 2017 the King Mohammed VI launched a construction and restoration project to preserve the cultural aspects of the medina in Marrakech. Similar projects have taken place in other city centres.

Day. It is possible for punters to bet on both Moroccan and French races. The site has a fully computerised system with more than 30 betting locations and 500 partner cafes across the country.

Last year betting turnover for the horse racing sector amounted to MAD6.4bn (a rise of three per cent) giving it a 70 per cent market share (not including casinos).

The racetracks are located in:

- **Casablanca** – Created in 1912 this racetrack is 20 hectares in size with a 1,700m track and capacity for 700 spectators and holds 44 meets a year. There is also a golf course, country club, restaurant and swimming pool.
- **Rabat** – Created in 1920 this site is 54 hectares in size with a capacity of 2,000 spectators and around 44 meets per year.
- **El Jadida** – Opened in 1920 this site is 18 hectares and has the capacity for 1,000 spectators and holds 37 meets per year.
- **Settat** – Opened in 1986 it is 40 hectares in size with two tracks of 1km and 758m. There are 29 meets per year and the site also has a

tennis court and swimming pool.

- **Meknes** – Opened in 2004 the site is 44 hectares and has the capacity for 1,000 spectators. There are 30 meets per year.
- **Khemisset** – Opened in 2009. This has a 1,500m track and capacity for 2,000 visitors with 33 meets per year.
- **Marrakech** – the final and most recent track in Marrakech opened in May 2017. The track is 1,430m and built on 34 hectares of land in the Saada Commune. The new opening is part of a plan to open three new international standard racetracks in Morocco of which Marrakech is the first. Another two are due to open in the next few years.

CASINOS

There are seven casinos across four cities in Morocco. There are three casinos in Agadir, two in Marrakech, one in Tangier and one in El Jadida.

The first casino, Casino de Marrakech, was opened in 1952 when Morocco was still under French control. When Morocco gained its independence in 1956 other casinos began to open and since the decree of the Prime Minister



in 2002 they have been operating legally.

Poker is hugely popular in Morocco and Marrakech is fast becoming a poker capital and Casino de Marrakech is a venue for many tournaments.

MARRAKECH

Marrakech is known as the Pearl of the South and the city is a delightful onslaught of all the senses from the vivid colours of dyed wool, to the sound of the 50,000 mopeds zooming around the streets to the smell of the spices overflowing in sacks outside market shops and stalls.

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Casino Marrakech at the Hotel Es Saadi Gardens was the first casino in Morocco which opened back in 1952. Today it hosts one of the biggest poker tournaments such as the Marrakech Poker Open and the World Series of Poker circuit which was held for the fifth time in Marrakech in January 2019.

The casino was completely renovated in 2003 but kept its 1950s style facade and houses 90 slots and table games. The casino is part of the Es Saadi Marrakech resort which opened later in 1966. This is a huge walled resort in the heart of the city which includes two hotels - the 150 room and 15 suite five star L'Hotel and Le Palace with 84 luxury suites surrounding a 2,400q.m lagoon pool plus there are eight Ksars (Berber style villas) and 10 villas with private pools within the eight hectare grounds. Prices can top over €2,000 per night for the villas and it's an

exclusive oasis and a popular destination for the rich and famous. There are several restaurants and bars, three spas and a nightclub. It is now owned by Jean-Alexandre and his wife, the grandson of the original founder Jean Baucht who owned the Moulin Rouge and Casino de Paris.

Le Grand Casino at the Hotel La Mamounia is also located in the heart of Marrakech. It's a luxurious and grand casino offering 140 slots plus 20 table games and poker room.

The Hotel La Mamounia opened back in 1923 and is a favourite of the elite including Winston Churchill who apparently used to paint during his stay there during the war. The history of the building dates back to the 12th century and the gardens were gifted to Prince Al Mamoun as a wedding present in the 18th century. The hotel at one time only had 50 rooms but was expanded in 1946 to include 100 rooms and has been refurbished several times over the years, most recently in 2006 and now has 210 rooms and suites. The hotel is set in 17 acres of gardens with 700 year old olive trees. It's just 10 minutes from

the airport with several bars and restaurants, spa and stunning gardens including its own vegetable plot. It is part of the Grand Luxury hotel list which includes 140 odd hotels considered 'exceptional' throughout the world.

TANGIER

Tangier is a port town in the north west of Morocco on the Maghreb coast and at the western entrance to the Strait of Gibraltar where the Med meets the Atlantic.

The town is the capital of the Tanger-Tetouan-Al Hoceima region and was once a strategic Berber town and today is the second most important industrial centre after Casablanca and has shaken off its rather seedy image and is now reinventing itself as a key destination spot.

The economy relies heavily on tourism and thanks to a new luxury port project, Tanger-Med, completed in 2007, is a key site for its maritime industry.

There were 711,600 visitors to the area via

Reports

MOROCCO MARKET



Tangier airports and 2.4 million via Tangier ports. There are 11,000 beds registered in Tangier.

Casino Malabata Tanger at the Movenpick Hotel overlooks the Bay of Tangier on the shores of the Mediterranean. It's only a five to 10 minute drive from the city centre but is a beach side resort offering 240 rooms and suites, various restaurants, bars, gym, conference rooms and a large free form swimming pool. Movenpick Hotel & Resorts is a global firm with Swiss roots and since 1973 operates more than 84 hotels/20,000 rooms across 20 countries.

Movenpick was acquired by Accor Hotels and the company operates another two Movenpick

branded hotels in Morocco in Casablanca and Marrakech.

EL JADIDA

The walled town El Jadida is a UNESCO world heritage site and former Portuguese fort dating back to the 16th century and as such has a European feel to it as churches sit next to mosques.

It is just 100km south of Casablanca in the region of Doukkala-Abda and has a population of almost 200,000. It was seized by the Portuguese in 1502 as a prime stopover point on the India trade routes. They established a

thriving port city and built a fortress around it to protect it which still exists today. The Portuguese abandoned the territory in the mid 1700s and it sat abandoned for years until the Sultan Abd al-Rahman of Morocco ordered a mosque be built and the city was rebuilt and renamed al-Jadida (the New).

It's a popular holiday hot spot in the summer for Moroccan tourists and more relaxed than Agadir and Tangier. There are 3,343 beds registered in El Jadida.

The Mazagan Beach and Golf Resort is close to El Jadida town which opened in 2009 and has been developed by Kerzner International. This resort



luxury hotel resorts dot the beachfront offering a more upscale type holiday aimed at families looking at the all inclusive type destination.

The area was destroyed by an earthquake in 1960 which saw 15,000 people lose their lives (a third of the population) and about 70 per cent of the town destroyed. The town was evacuated and over the next few decades had to virtually rebuild itself with its port, maritime and tourist identity at the forefront. A new city centre was developed with wide avenues and modern hotel infrastructures.

Today Agadir is a major coastal resort with a third of all Moroccan bed nights and often a good base for tours to the Atlas Mountains. It was ranked as having the 37th best city beach by website Flightnetwork.com. Its golden sands offer something for everyone from surfing to jet skis to camel rides.

Agadir recorded over one million tourists last year, an increase of over 13 per cent. There are almost 40,000 beds registered in Agadir.

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also boasts a casino plus golf course.

It is a luxurious five star hotel complex on 250 hectares of land bordering a 7km stretch of sandy beach on the Atlantic Ocean. It's just an hour drive from Casablanca airport.

The \$370m resort was the first phase of the plan to develop the area as part of the Plan Azur project and took two years to construct. Kerzner currently operates 11 hotels via three brands (Mazagan, Atlantis Resorts and One&Only Resorts).

There are 500 rooms and suites including eight Ambassador suites and two Royal suites, 14

restaurants and bars, spa, fitness centre, golf course, football pitches and the biggest casino in north Africa.

It's designed with an Arabic-Moorish style and the resort circles a Grand Riad (courtyard) with swimming pool. The casino features over 463 slots and 44 gaming tables and is open 23 hours a day.

AGADIR

Agadir, a popular coastal resort on the Atlantic Ocean, was a result of Morocco's focus on mass tourism developed 10 years ago in an attempt to mirror countries such as Tunisia. Its modern

Atlantic Palace Casino at the Agadir Golf Thalasso and Casino Hotel has 328 rooms and suites and is nestled in 10,000sq.m of Moroccan garden in the centre of the seaside resort. Construction of the hotel began in the early 1990s and is a mixture of Arab and Moorish design and the hotel offers outdoor pools, golf course, spa and four restaurants and bars. The casino is operated under an operating agreement with the hotel by Cirsa and it is open 23 hours a day offering 186 slots and 20 tables. It is also home to the famous restaurant Al Fanous.

Le Mirage Casino is a standalone casino located in the village of Club Valtur on the Agadir seafront. There are 96 slots and eight table games. It is also operated by Cirsa and a company source said: "Our company has great confidence in Morocco due to its political and economic stability – such as infrastructures' investments- and also for its tourist potential."

Finally Shem's Casino is located just 200m from the Agadir Beach. The casino is one of the oldest in Agadir and has 16 table games and over 100 slots plus poker room. There is a restaurant Jean Cocteau and English bar.