

## Regulation of digital advertising in Morocco: challenges of digital sovereignty, economic impacts and societal prospects in 2025.

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**Abstract**

This paper will discuss the inception of a specific regulatory framework for digital advertising in Morocco in 2025. In an environment where international platforms (Google, Meta, TikTok, YouTube) dominate more than 80% of digital advertising investments, the absence of clear national legislation relates to questions of digital sovereignty, transparency, and consumer protection. This article will engage in a discussion of the context of this legal reform, its major drivers, and the effects the new law might have on digital marketing stakeholders, advertisers, local agencies, foreign platforms, and users. In the framework of a literature review and analysis of institutional debates, this article will articulate some of the major challenges of digital advertising regulation, and will also reflect on its potential role in the development of a more competitive, equitable digital environment in Morocco.

**Keywords :** Digital Advertising, Regulation, Digital Marketing, International Platforms, Digital Sovereignty.

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## **Introduction**

For over a decade, digital advertising has grown exponentially around the world, threatening traditional media business models and challenging traditional corporate communication practices. Statista (2024) estimates that global investment for digital advertising is over £50 billion and is greater than 65% of the global investment in advertising. This dynamism indicates the importance of digital technologies that have been incorporated into everyday life, especially with the emergence and growth of social media, online video and algorithmic targeting technologies.

This trend is notably present in Morocco. In 2025, over 80% of advertising budgets are devoted to digital channels, mostly dominated by international giants Google, Meta (Facebook, Instagram), TikTok and YouTube. These platforms hold the lion's share of revenues, owing to their technological strength and their ability to mine user data to provide highly personalised campaigns. This deep transformation of the Moroccan media landscape offers major challenges: imbalance between local operators and global platforms, opacity of financial flows, tech dependence, but also opportunities in terms of innovation, economic development and the internationalization of Moroccan companies (El Amrani & Haddad, 2024).

Nonetheless, in spite of this rapid evolution in the digital media environment, the legal framework in Morocco largely relies on standards that came from pre-existing traditional audiovisual regulation predicated on the historical dominance of radio and television media structures. This absence of regulations specific to digital media has generated a legal vacuum that hampers the state's ability to regulate advertising practices, protect consumers and ensure fair competition (Benkirane, 2023). As Flew, Martin and Suzor (2019) discovered, the asymmetrical relationship between the fast pace of the digital market's development and the slow pace of the adaptation of public policies towards digital media struggles within developing countries remains a challenge.

The problem is compounded by the international dimension of digital platforms. They operate on the Moroccan market, despite not having direct local legal or tax representation. This makes it difficult to monitor financial flows or tax revenues on advertising investment. At the same time, Moroccan agencies and media face a structural competitive disadvantage, as they are not in a position to match multinational analytical tools, vast databases or economic models. This unbalanced competitive context fuels a growing digital dependency on foreign countries and begs the question of economic and cultural sovereignty within the country (Kenney & Zysman, 2020).

In response to this situation, in 2025 the Moroccan government initiated a bill aimed at regulating digital advertising, inspired by international standards and in particular the Digital Services Act (DSA) adopted by the European Union. The stated objective is twofold: on the one hand, to protect consumers and enhance transparency in advertising practices; on the other hand, to rebalance the market in favour of local players, while ensuring fair competition (OECD, 2023). Several international experiences – in Europe, Latin America and Asia – show that the adoption of appropriate regulatory frameworks can help to structure more transparent, fair and innovative digital markets (Kshetri, 2021).

The central question we ask is therefore: what are the challenges and impacts of regulating digital advertising in Morocco in the context of 2025, and how can this regulation help to structure a more transparent, fair and competitive market?

To answer these questions, this article adopts a literature review and critical analysis approach, drawing on both recent academic work on the regulation of digital platforms and institutional data relating to the Moroccan market. The article is divided into two main parts:

- **The first part sets out the context and motivations for regulating digital advertising in Morocco, highlighting the political, economic and societal challenges of this reform.**
- **The second analyses the challenges and impacts of the future law on the various players in digital marketing: international platforms, local agencies, advertisers and consumers.**

This structure aims to shed light on the complex dynamics surrounding the regulation of digital advertising in Morocco, while offering insights into the place of this reform within the broader context of digital sovereignty and the sustainable development of the national digital economy.

## **1. Context and motivations for regulating digital advertising in Morocco**

### **1.1. The state of the digital advertising market in Morocco in 2025**

The Moroccan advertising market has entered a phase of unprecedented structural transformation, marked by a massive shift towards digital channels. According to the most recent data from the High Authority for Audiovisual Communication (HACA, 2024), digital advertising now accounts for more than 80% of advertising investment, compared to less than 30% a decade ago. This spectacular growth illustrates the phenomenon of "platformisation" of the market, where a handful of international players – Google, Meta, TikTok and YouTube – account for almost all of the financial flows.

This observation is not specific to Morocco. It is part of a global trend in which digital platforms are exercising increasing control over the advertising value chain, capturing both content distribution and data collection (Kenney & Zysman, 2020). These platforms benefit from a particularly powerful network effect: the more users they attract, the more behavioural data they have at their disposal, enabling them to offer unrivalled advertising targeting.

However, this concentration poses many challenges for local players. Moroccan communication agencies and media outlets, whether traditional or digital, struggle to compete in terms of visibility, analytical tools and algorithmic power. As Napoli (2019) explains, this situation creates a "structural dependence" of advertisers on large platforms, forcing them to use these platforms to effectively reach their audiences. As a result, a significant portion of advertising budgets escapes the national ecosystem, undermining the sustainability of local businesses and limiting their capacity for innovation.

Also, the lack of a discrete regulatory regime makes it even more uncertain where financial flows go. Advertising revenue from campaigns run on an international platform is not always reported in the national economy. These foreign companies may be avoiding millions in taxes and the economic benefits normally accruing to the state. This phenomenon poses questions of digital sovereignty - a country's ability to control its data, infrastructure, and digital economy; (Gorwa, 2019).

Comparative analyses reveal that other emerging countries currently experiencing similar elements have demonstrated robust reform potential. For instance, India and Brazil are employing new tax and regulatory approaches, and mandating relevant platforms to contribute more to domestic economies (Kshetri, 2021). These experiences offer important lessons for Morocco as it seeks to establish a more balanced model of place-based investment that promotes foreign investment while protecting strategic national interests.

Therefore, the current landscape of the Moroccan advertising market in 2025 perfectly highlights the necessity of regulation that will provide a better distribution of advertising resources, create transparency and uphold local actors in competition.

**Tableau N°1 : Digital Advertising Market in Morocco in 2025 by Segment**

<b>1. Digital Advertising Segment</b>	<b>3. Estimated Spending in 2025 (USD million)</b>
<b>4. Search Advertising</b>	<b>5. 325.86</b>
<b>6. Display Advertising (Banners)</b>	<b>7. 72.00</b>
<b>8. Social Media Advertising</b>	<b>9. 73.19</b>
<b>10. Digital Classifieds</b>	<b>11. 15.88</b>
<b>12. Total</b>	<b>13. 486.93</b>

**Source :** Statista. Digital Advertising Market in Morocco – Outlook 2025. Statista Market Insights, 2024.

### **1.2. The political, economic and societal motivations behind regulation**

The regulation of digital advertising in Morocco is situated within a complex space that includes the political, economic and social dimensions.

Politically, the regulation demonstrates an aspiration for Morocco's digital sovereignty. In a transnational digital space inhabited primarily by private actors, states are looking to reclaim their ability to act. As Flew, Ren and Suzor (2021) stated, governments are striving to shift from a reactive position to one that is proactive (platform governance). Consequently, the requirement for platforms to appoint a local legal representative in Morocco is an initial step in holding foreign actors accountable in the national market.

Economically speaking, digital advertising is a strategic lever for development and competitiveness. It directly influences companies' visibility, their ability to reach new markets and innovate in their communication strategies. However, the lack of regulation encourages capital flight abroad and limits internal value creation. As Mansell (2017) points out, an appropriate regulatory framework can act as a catalyst by stimulating local innovation and reducing dependence on foreign solutions. For Morocco, the objective is therefore to promote a competitive rebalancing in favour of national players by ensuring a more equitable advertising environment.

On a societal level, regulation responds to a growing demand for transparency and consumer protection. The proliferation of sponsored content, intrusive advertising, fake news and micro-targeting practices raises legitimate concerns about privacy and the manipulation of public opinion. According to Tadjewski and Brownlie (2008), when unregulated, digital advertising can

exacerbate social imbalances and lead to a loss of trust in the media. In the case of Morocco, where public awareness of personal data protection remains limited, clear regulation would help to enforce ethical standards and build trust between users, advertisers and platforms.

In short, the motivations behind Moroccan regulation are part of an overall strategy aimed at balancing political sovereignty, economic competitiveness and social justice. The challenge is not only to control a market, but to lay the foundations for a sustainable, equitable digital ecosystem that respects national values.

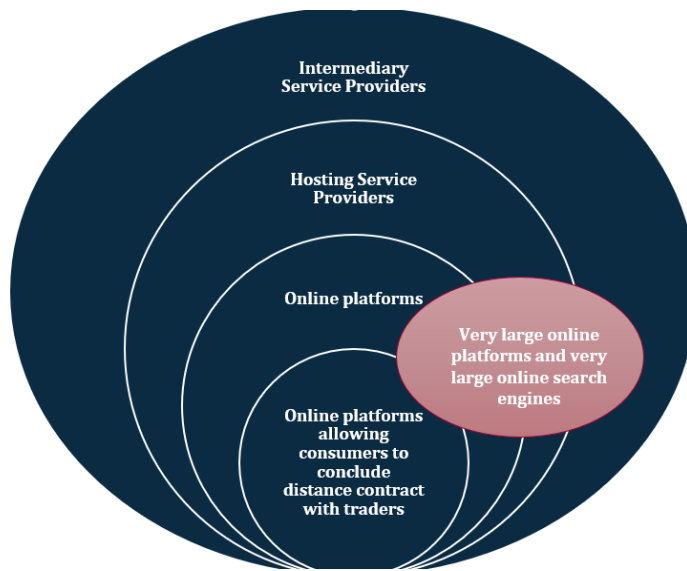
## **2. The challenges and impacts of the future law on digital marketing**

### **2.1. New obligations imposed on international platforms**

The major innovation of the Moroccan bill lies in the imposition of specific obligations on international platforms in order to reduce the power asymmetry between them and national regulators. Inspired by the principles of the Digital Services Act (DSA) adopted in 2022 by the European Union, the Moroccan text stipulates that platforms operating on its territory (Meta, Google, TikTok, YouTube, etc.) are required to:

- **Appoint a legal representative in Morocco, responsible for their advertising activities and interactions with public authorities.**
- **Publish regular reports on the volume, nature and revenue generated by advertising campaigns targeting the Moroccan market.**
- **Ensure the transparency of the targeting and recommendation algorithms used for the distribution of advertisements.**
- **Comply with personal data protection requirements, in line with both Moroccan Law 09-08 and international privacy standards (OECD, 2023).**

**Figure N°1 : Key Obligations Imposed on Digital Platforms under the Digital Services Act (DSA)**



**Source :** Council of the European Union (2022). Digital Services Act (DSA): New rules for a safer digital space. Retrieved from <https://www.consilium.europa.eu/en/policies/digital-services-act/>

These measures serve a dual purpose. On the one hand, they increase the authorities' visibility of financial flows that were previously beyond national control. On the other hand, they aim to establish greater accountability for platforms, which are often accused of operating in an opaque and exclusively commercial manner (Helberger, Pierson & Poell, 2018).

The scientific literature on platform governance emphasises the importance of these transparency mechanisms. According to Gorwa (2019), the territorialisation of digital platforms remains one of the major challenges of regulation: how can global players operating without a significant physical presence in a country be compelled to comply with local rules? The Moroccan case is part of this issue and attempts to provide an answer by establishing clear legal responsibility.

Finally, this regulation illustrates a paradigm shift. Far from limiting itself to a passive role, the Moroccan state is seeking to rebuild its regulatory power in a digital space dominated by private interests, by adopting a hybrid model combining incentives and constraints (van Dijck, Poell & de Waal, 2018).

## **2.2. The impact on local players, advertisers and consumers**

The adoption of the law will have different impacts depending on the players involved in the advertising ecosystem.



For local players (communication agencies, Moroccan digital media), regulation represents an opportunity to rebalance competition. By requiring digital giants to comply with national standards, legislators are creating a more equitable environment that could promote the development of local advertising ecosystems. As Goldfarb & Tucker (2019), regulation can stimulate local innovation by reducing the barriers to entry imposed by the technological dominance of large platforms. In the Moroccan context, this could encourage the emergence of endogenous digital solutions (local AdTech platforms, digital advertising agencies) capable of attracting a larger share of advertising investment.

For advertisers, and in particular small and medium-sized enterprises (SMEs), regulation introduces greater transparency and predictability in campaign management. Opaque pricing practices, often criticised in environments dominated by international platforms, could be limited by the obligation to publish regular reports. However, risks remain: regulatory compliance could generate additional costs for platforms, which are likely to be passed on to advertisers. As Lobato (2019) explains, regulations in the digital economy often produce ambivalent effects, oscillating between gains in terms of fairness and increased transaction costs.

For consumers, the law represents a significant step forward in terms of protecting digital rights. It should limit the proliferation of misleading or invasive advertising, increase transparency regarding the use of personal data, and promote greater trust in the digital ecosystem. Boerman, Kruikemeier and Zuiderveen Borgesius (2017) have found that user confidence in online advertising ties into the user perception of the amount of regulation and transparency around advertising. In a country where citizens' digital culture is still evolving, this reform could also serve an educational function, increasing awareness of data protection issues where users and citizens will know their rights digitally.

To summarize, regulation cannot only be considered a matter of administrative constraint, it works strategically as a lever to enhance competitiveness, transparency and trust. However, the viability of regulation is contingent on a number of conditions; the state must monitor effectively, cooperation must be created between public authorities and platforms, and mechanisms for engaging with local stakeholders (such as dialogues with public services or trade groups) must be created. Without safeguards in place there are risks on two fronts - either a regulation that is too restrictive and slows advertising investment, or regulation simply becomes symbolically meaningless.

**Table 2.** Expected Impacts of Digital Advertising Regulation in Morocco on Key Stakeholders

<b>14. Stakeholder</b>	<b>15. Positive Impacts</b>	<b>16. Potential Risks</b>
<b>17. Local actors (media, agencies)</b>	18. Competitive rebalancing, stimulation of local AdTech innovation, attraction of more advertising investments	19. Need for adaptation to regulatory compliance standards
<b>20. Advertisers (SMEs, companies)</b>	21. More transparency, predictability of costs, fairer competition	22. Possible increase in advertising costs due to compliance expenses
<b>24. Consumers (users)</b>	25. Stronger data protection, less intrusive/misleading ads, increased trust in digital ecosystem, educational effect	26. Risk of partial implementation reducing effectiveness of protections

**Source :** Authors

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## **Conclusion**

The regulation of digital advertising that started in 2025 in Morocco happens in a complex and multi-faceted context of global digital platforms that operate quasi-unchallenged, opaque financial flows, and a legal gap that does not show attention to the specificities of the digital realm. As we have highlighted, this reform is not just a technical modification to existing rule, but rather is an authentic social project to reconceptualize Morocco's position in the global digital economy.

Indeed, digital advertisement is no longer just an economic activity. It is a form of power, and has become a mechanism to produce effects on consumer behaviour, public opinion and competition between companies. In that respect, relinquishing a part of the market to foreign players would be a specific form of reliance, or dependence, economically, and culturally/politically. From that perspective, the reform started in 2025 signifies a clear intention of the Moroccan state to recover its digital sovereignty and reclaim a strategic space.

In the forthcoming law, the digital giants will be subject to new obligations that will include even more obligations from the digital giants, which include naming a legal representative, publishing regular reports of their advertising efforts, and stricter obligations for transparency of their targeting algorithms. While these measures, which are similar to principles documented in frameworks such as the European Digital Services Act and overseas best practices, it is undoubtedly a step forward for improvements for transparency and accountability on platforms. However, these measures will only be effective, if states develop and continue to enforce innovative measures, and have the ability to mobilise and enact the technical and human resources necessary to ensure compliance and effective consequences.

There are a number of impacts to expect. For local actors, regulation is a chance to rebalance the competition, which may afford Moroccan agencies more freedom and therefore more innovation, in a weak advertising ecosystem. For advertisers, possibly clearer pricing practices and potential for a more effective campaigns, notwithstanding likely higher compliance costs from the platforms passed on to advertisers. And finally, consumers, it is a significant advancement towards the protection of their rights, in limiting unsolicited and intrusive advertising, and transparency on the use of their personal information.

It would be unrealistic to suggest that legislation alone will address inequity in the marketplace. Internationally, experience indicates that digital regulation is not fixed, but rather continually evolves within the pressures exerted by digital technologies and the avoidance actions adopted by

large platforms; it can therefore be stated that, in this respect, Morocco must ensure that this regulation can be embedded into a long-term dynamic that draws together continuous technological vigilance, international collaboration and an inclusive dialogue across all stakeholders.

The central dilemma remains balance. Over-regulation could dissuade investment behind advertising and inhibit the speed of digitalisation of business in Morocco. Under-regulation, or poorly enforced regulation could simply be performative, and leave Morocco reliant on foreign platforms. Ultimately, the success of this reform will come from being able to regulate in a way that is protective, and encouraging, to spend on digital marketing that is competitive, transparent and ethical in Morocco.

In summary, the emergence of digital advertising regulation in Morocco presents an extraordinary opportunity to organize a sovereign digital environment that leverages the Internet's global reach while also recognizing its endogenous development. Thus the Kingdom is in synch with the global trend for states to reclaim the digital economy and protect their economies from the web giants. It also provides a watershed moment for the consideration of social justice, ethics, and wellness in the digital transformation of this country. This is not merely technical and financial; this is a social project that will create a Moroccan digital environment that respects citizens, promotes innovation, and lifts a burden to achieve inclusive development in an ever-changing media ecosystem.

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