

# MOROCCO

## EDUCATION, TRAINING AND EMPLOYMENT DEVELOPMENTS 2018

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# KEY POLICY DEVELOPMENTS IN EDUCATION, TRAINING AND EMPLOYMENT

The outlook for Morocco is positive in terms of its economy and the reforms it is implementing. A new government is in place since April 2017. It is committed to continuing and stepping up the pace of reforms, which are already well on track. Particular attention is being paid to key areas related to governance, education and the labour market, with a view to increasing competitiveness and promoting inclusive growth<sup>1</sup>.

An important change in the education sector was the merging of the Ministry of National Education and Vocational Education and Training with the Ministry of Higher Education and Scientific Research. Two secretaries of state, in charge of vocational education and training (VET) and higher education respectively, have been appointed. At the end of October 2017, four ministers were dismissed by order of the King. These included the Minister of Education and the Secretary of State for VET. Replacements were appointed in early 2018. As a result of these changes at political decision-making level and the limited financial and human resources, reform of the VET sector has slowed down significantly and very little progress has been made in the implementation of the reform strategy.

In October 2017, the Sector Observatory (Observatoire des Branches) was established. The observatory will foster collaboration with the private sector. In particular, it will help to identify skills needs in the priority economic sectors with a focus on local needs. It will be funded mainly by the VET tax.

In 2018, the new framework Law on Education was passed by the Chamber of Counsellors and still needs to be passed by the Chamber of Representatives.

In June 2018, the draft Law on Continuing Vocational Education was passed by the Chamber of Counsellors and also needs to be passed by the Chamber of Representatives. The law is based on a text proposed by the confederation of Moroccan industry (Confédération Générale des Entreprises Marocaines, CGEM) and includes important revisions such as the creation of a body charged with the management of continuing training. Its tripartite governing board consists of public administration, employer and trade union representatives.

On the employment side, a Plan for Employment Promotion was launched in 2017 (Plan National de Promotion de l'Emploi 2021). It is based on the National Employment Strategy 2015–2025 and includes specific strategy axes that encompass various actions intended to promote employment and employability.

The EU supports the VET sector through a Sector Reform Contract, which includes an envelope for technical assistance. The EU support, together with the government's commitment to boost reforms in the country, should lead to a resumption of the VET reform implementation process.

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<sup>1</sup> See government plan at <http://www.cg.gov.ma/fr/DOCs/pg2017.pdf> for 2016–2021.

# 1. KEY DEMOGRAPHIC AND ECONOMIC CHARACTERISTICS

The population of Morocco is increasing. It rose from approximately 32.18 million in 2012 to 34.85 million in 2017. However, the pace of growth has been decreasing since 1980 and is expected to reach 0.3% in 2050<sup>2</sup>. The age distribution is gradually changing. Projections indicate that the pre-school and school-age population will gradually shrink, while the active population is expected to keep growing until 2050. Thus, the projections indicate a shift in pressure from the school system towards the labour market and social security systems. The latter seems to be particularly affected by the growth of the population aged 60+, which is expected to reach 23.2% of the total population in 2050, compared to 9.4% in 2014.

Morocco has a long history of emigration and this shapes the socio-economic outlook. Outward migrants are mainly men, emigrating primarily to look for job opportunities. Women are more likely to move from rural to urban areas, in most cases as a result of the emigration of their spouse. The number of working migrants has increased since 2012, but decreased slightly (-0.5%) between 2015 and 2016. The majority of migrant workers move to France (70.7%), followed by Spain (24.4%) and the Emirates (3%)<sup>3</sup>.

Thanks to its geographic position in the region and relatively sound infrastructure, Morocco intends to position itself strategically as an economic and financial hub between Europe and the African continent<sup>4</sup>. Morocco is an upper middle-income country according to the World Bank classification. The country has made undeniable progress over the past 15 years and has stepped up its growth rate and initiated the process of narrowing the standard-of-living gap with southern European countries.

Morocco's economic growth relies heavily on the agricultural sector. After being hit by a drought in 2016, the economy experienced a sharp slowdown with a GDP growth rate of 1.2%. Boosted by a strong rebound in agricultural output, the real GDP growth rate reached 4.1% in 2017 and is projected to decline to 3% in 2018<sup>5</sup>. Non-agricultural GDP has remained fairly stable over the years at around 2.8%. In terms of contribution to GDP, the agricultural sector contributed 13%, industry 29.7% and services 57.4% in 2016. In the same year, an examination of employment by sector indicates that the majority of the workforce was concentrated in the service sector (40.8%), followed by agriculture (38%) and industry (21.1%).

In recent years, the government has implemented measures to improve the business environment. Morocco is ranked 71st (out of 137 countries) in the Global Competitiveness Index 2017–2018. Nevertheless, some critical problems remain, in particular corruption, inefficient bureaucracy, access to finance and tax rates. The recent assessment of the reforms identified in the SME Policy Index<sup>6</sup> indicates that Morocco could inspire other economies in the region to improve their SME policies. However, many challenges still remain, such as a reliance on low value-added activities, the

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<sup>2</sup> Haut Commissariat au Plan, Centre d'Etudes et de Recherches Démographiques (CERED), *Projection de la Population et des Menages 2014–2050*, May 2017.

<sup>3</sup> Ministère du Travail et de l'Insertion Professionnelle (MTIP), Bilan Social, 2016

<sup>4</sup> See <http://pubdocs.worldbank.org/en/873111494618941322/Morocco-CEM2017-summary-ENG.pdf>

<sup>5</sup> See <https://www.worldbank.org/en/country/morocco/overview>

<sup>6</sup> OECD/EU/ETF, *The Mediterranean Middle East and North Africa 2018: Interim Assessment of Key SME Reforms*, SME Policy Index, OECD Publishing, Paris, 2018.

informal economy, underemployment and unemployment. There is a need to step up efforts for regional development and continue working on the framework conditions that will allow entrepreneurs to prosper (e.g. infrastructure, education, financial markets).

## 2. EDUCATION AND TRAINING

### 2.1 Trends and challenges

Morocco is a country with a low-skilled workforce. A large share of the working-age population has a low level of educational attainment. In 2015, 81.7% of the adult population (25 to 64-year-olds) had a low level of education, 10.5% a medium level and only 7.9% a high level. The share of public expenditure on education as a percentage of GDP is available only for 2016 and it stood at 4.7%. VET expenditure as a percentage of GDP stood at 0.2% in 2015<sup>7</sup>. Funding for VET comes from a variety of sources, including the VET tax (23%), the state budget (38%), households (23%) and enterprises (14%).

Literacy has improved substantially in the country, with important differences between the generations. In 2012, 91.22% of young people (aged 15–24) were literate, while the percentage of literate adults (over the age of 65) stood at 32.75%<sup>8</sup>. Despite a significant increase in gross enrolment at all levels of education, there is a high dropout rate from secondary education (11%)<sup>9</sup>, posing serious challenges in terms of social inclusion, readiness for lifelong learning and labour force competitiveness. Many young people have lost hope for a better future and this results primarily in emigration<sup>10</sup>.

The share of VET students in secondary education (6% in 2012) and upper secondary education (11.6% in 2012) is low. The public sector still dominates the VET offering, as 84% of all students choose a public VET institution. Around 60% of all graduates in 2015 were concentrated in three sectors: management and commerce (21%), followed by metalworking and mechanics (19%), construction (12%) and information and communications technologies (ICT) (11%)<sup>11</sup>.

### 2.2 Education and training policy and institutional setting

According to the Country Opinion Survey Report, education is viewed by Moroccans as one of the top priorities for development<sup>12</sup>. This is demonstrated in the many efforts made to reform the education and training system, starting with the Vision for Education 2030<sup>13</sup> and the VET Reform Strategy 2021<sup>14</sup>. The Vision for Education 2030 emphasises education as a gateway to social and personal development. It aims to create fairness, equality of opportunity and quality education for all. In 2018,

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<sup>7</sup> Ministry of National Education, Vocational Training, Higher Education and Scientific Research.

<sup>8</sup> See <http://uis.unesco.org/country/MA>

<sup>9</sup> Ministry of National Education, Vocational Training, Higher Education and Scientific Research (2016–2017 school year), see <http://www.courdescomptes.ma/fr/Page-27/publications/refere/refere-du-premier-president-de-la-cour-des-comptes-sur-les-conditions-de-preparation-et-de-gestion-de-la-rentree-scolaire-2016-2017/5-190/>

<sup>10</sup> Chauffour, J.P., World Bank Group, *Morocco 2040: Emerging by investing in intangible capital*, World Bank Group, Washington DC, 2018.

<sup>11</sup> Secretary of State for Vocational Training, *La formation professionnelle en chiffres, 2016–2017*, see <http://www.dfp.gov.ma/images/pdfdocs/2018/FP%20en%20Chiffres%202016-2017.pdf>

<sup>12</sup> World Bank, Morocco Country Opinion Survey Report, 2014.

<sup>13</sup> Vision stratégique de la réforme 2015–2030: Pour une école de l'équité, de la qualité et de la promotion, see <https://www.men.gov.ma/Fr/Pages/Accueil.aspx>

<sup>14</sup> Stratégie de la Formation professionnelle 2021, see <http://www.dfp.gov.ma/>

the new draft framework Law on Education was passed by the Chamber of Counsellors and still needs to be passed by the Chamber of Representatives.

In 2015, the President of the Government of Morocco made a specific commitment to develop a national qualifications framework (NQF). Since then, he has coordinated the dialogue and consultation process. The NQF National Commission officially met for the first time in May 2016. Since then, the situation has remained stable, and no relevant progress has been made either in the preparation of the legislative framework or in the development of relevant working instruments and methods to operationalise the NQF. However, the new draft framework Law on Education, which includes the creation of an agency responsible for the NQF, represents a sign of positive development with regard to the future implementation of the NQF.

The main objective of the National Strategy for Vocational Training 2021 is 'quality VET for all and throughout life, to support development, to increase the value of human capital and boost competitiveness'<sup>15</sup>. The strategy envisages a governance structure involving new specific national, regional and sectoral commissions, along with a steering committee to monitor and evaluate implementation of the strategy. Work has begun on defining the role, functions and operational details of these commissions, which will effectively come into force once shared objectives and leadership are confirmed.

Despite the government's commitment to VET reforms, implementation of the VET strategy has slowed down. This is mainly due, on the one hand, to the recent rapid changes at the political decision-making level, and, on the other hand, to vacant key management and middle management positions, leading to instability and uncertainty within the sector and a negative impact on the reform implementation process.

The VET sector also suffers from limited financial and technical resources. For example, it will be difficult to achieve the objective of increasing the share of work-based learning (WBL) from around 30% in 2016 to 50% in 2021, especially considering that the main VET operator, OFPPT (Office de la formation professionnelle et de la promotion du travail), no longer uses apprenticeships as a training modality. The development of WBL is hindered by both external and internal obstacles. With regard to external factors, SMEs represent almost 98% of all businesses in Morocco<sup>16</sup> and 83% of businesses are micro enterprises that employ an average of three employees. These enterprises are not able to conform to the standards required by regulated training. With regard to internal factors, there is no overall development strategy that is specific to apprenticeship training and work-based vocational training. From a financial perspective, there is a lack of financial resources for apprenticeships<sup>17</sup>. Stakeholders and the government will need to implement more effective measures to expand WBL and, at the same time, improve its quality and relevance.

After many years of being on hold due to the opposition of employers with regard to the management of the funds collected through the VET tax, the draft Law on Continuing Vocational Education was passed by the Chamber of Counsellors in June 2018 and still needs to be passed by the Chamber of

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<sup>15</sup> Ministry of National Education, Vocational Training, Higher Education and Scientific Research, *Stratégie nationale de la formation professionnelle 2021*, see <http://dfp.gov.ma/images/pdfdocs/2016/Strategie%20Formation%20FR.pdf>

<sup>16</sup> OECD/EU/ETF, *The Mediterranean Middle East and North Africa 2018: Interim Assessment of Key SME Reforms*, SME Policy Index, OECD Publishing, Paris, 2018.

<sup>17</sup> Slassi Sennou, M., European Training Foundation, *Work-based learning in the Maghreb region, country report Morocco*, 2018 (forthcoming).

Representatives. The law is based on a text proposed by the CGEM and includes important revisions such as the creation of a body in charge of the management of continuing training with a tripartite governing board that consists of public administration, employer and trade union representatives. The draft law also introduces the possibility for employees to get recognition for their professional experience. But it will be necessary to define a system of validation of prior learning as no such system currently exists. The other innovation concerns the possibility for employees to benefit from a training credit of three days per year, paid for by their employer<sup>18</sup>.

The EU supports VET reforms through a Sector Reform Contract signed with the government of Morocco in November 2016. It includes specific complementary measures such as technical assistance to the State Secretariat for VET that began in May 2018 and a delegated cooperation arrangement to support regional development. In parallel with this, the EU-funded project *Kafaat Liljamia* supports VET sector reform and socio-economic development at regional level, in line with the regional development strategies. The project addresses local development by supporting the setting up and capacity building of specific multi-stakeholder working groups, which engage with institutional bodies at regional level for better-quality and more relevant skills offerings<sup>19</sup>.

An important change in the education sector was the merging of the Ministry of National Education and Vocational Education and Training with the Ministry of Higher Education and Scientific Research. The new ministerial setting, with responsibility for the whole education and training sector and a new State Secretariat for VET, required a period of transition to define the distribution of roles and functions in the new governance structure. The current Secretary of State is in place since January 2018. However, the position of Secretary General for VET, under the Secretary of State, has been vacant since September 2017. This has therefore put pressure on the overall system of VET governance and has delayed full implementation of the reforms. In October 2018, the King instructed the commission, chaired by the Head of the government to elaborate and submit a programme of measures to upgrade VET to better respond to labour market needs. The commission had three weeks to submit the programme<sup>20</sup>.

Despite the importance attached to education, illiteracy remains a problem. In order to effectively address this problem, the National Agency Against Illiteracy was established. The institution is chaired by the Prime Minister and its governing board comprises all the key actors and stakeholders involved in the implementation of a strategy to fight illiteracy. The EU has also provided substantial support in the fight against illiteracy through different programmes, including budget support and technical assistance.

While Morocco remains one of the countries in the region with the most advanced social dialogue and good cooperation between the business sector and VET, actions to further increase this cooperation and strengthen the capacities of employers (both in terms of quality and quantity) are necessary. In particular, efforts need to be made to expand the quantity and quality of work-based learning and to reduce skills mismatches in the labour market. The presence of the CGEM has been key in the preparation of the VET strategy, as well as in the dialogue on the use of the VET tax and the draft Law on Continuing Training and Work-based Learning. The recent establishment of the Sector Observatory

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<sup>18</sup> See <https://www.leconomiste.com/article/1029859-formation-continue-la-cgem-deconnecte-l-ofppt>

<sup>19</sup> For more information see [https://eeas.europa.eu/headquarters/headquarters-homepage/37254/kafaat-liljamia-pour-une-offre-de-formation-professionnelle-en-r%C3%A9gion-plus-efficace-et\\_fr](https://eeas.europa.eu/headquarters/headquarters-homepage/37254/kafaat-liljamia-pour-une-offre-de-formation-professionnelle-en-r%C3%A9gion-plus-efficace-et_fr)

<sup>20</sup> See <https://www.medias24.com/MAROC/Les-plus-de-Medias-24/186261-Le-Roi-Mohammed-VI-preside-une-seance-de-travail-consacree-a-la-formation-professionnelle.html>



in October 2017, funded mainly by the VET tax, could be an opportunity to foster collaboration with the private sector. In particular, it could help to identify skills needs in the priority economic sectors, with a focus on local needs.

## 3. LABOUR MARKET AND EMPLOYMENT

### 3.1 Trends and challenges

Morocco's labour market is characterised by three key challenges: lack of inclusion (young people and women are less integrated in the labour market), slow job growth and the predominance of low-quality/low-skilled jobs. Despite government policies, economic growth has not translated into the creation of decent jobs. According to the World Bank, only 129 000 jobs are created each year while the working-age population increases by 300 000 units per year. Job creation therefore remains insufficient<sup>21</sup>. Formal employment is concentrated in older and larger firms while small and medium enterprises (SMEs) face numerous constraints in operating and expanding. The agricultural sector absorbs a large segment of workers with approximately 38% of workers employed there. The growth of non-agricultural employment is slow and employment in the service sector is concentrated in low-skilled services; productivity is thus low.

The activity rate remains low and is declining (46.4% in 2016 compared to 48.4% in 2012). Large disparities exist between men and women, with activity rates of 70.8% and 23.6% respectively in 2016, and between rural and urban areas. This pattern, linked with a high incidence of self-employment (50.5% in 2016), suggests a subsistence-type of employment, mostly in the agricultural sector. The employment rate also shows a declining trend (from 44.1% in 2012 to 42.0% in 2016), suggesting that a large part of the population is becoming inactive. Employment rates are particularly low for women and decreased from 22.3% in 2012 to 21.0% in 2016. The integration of women in the labour market and their ability to avail of opportunities there has often been hindered by the business culture in Morocco.

Unemployment is a challenging problem in Morocco. Although the total unemployment rate has been rather stable and only increased slightly from 9.0% in 2012 to 9.4% in 2016, youth unemployment is relatively high. Moreover, the youth unemployment rate (among 15 to 24-year-olds) has been increasing, and reached 22.5% in 2016 compared to 18.1% in 2012. The NEET rate (young people who are not in education, employment or training) was also high at 27.5% in 2016 and showed a big gender gap (11.7% for men and 44% for women), as the majority of women are family carers.

Individuals with a higher level of education encounter serious difficulties in finding a (quality) job, as the unemployment rate for people with tertiary-level degrees tends to be higher than for those with primary or secondary education. Data indicates that the unemployment rate for people with a high level of education attainment has increased from 18.1% in 2012 to 22.0% in 2016. Data also indicates a high percentage of long-term unemployed people (67.2% of the total unemployment figure in 2016), who risk becoming discouraged jobseekers or decide to leave the country.

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<sup>21</sup> See <http://documents.worldbank.org/curated/en/477441523251051211/pdf/125041-WP-ENGLISH-PUBLIC-Summary-labor-market-note.pdf>



The labour market is also characterised by a high level of informality. Data collected by the Labour Market Observatory (Observatoire national du marché du travail, OMT) indicates that 62.4% of workers worked without an employment contract in 2013<sup>22</sup>. The World Bank indicates that the high level of informality not only undermines the protection and income available to workers (formal workers earn three times as much as informal employees with the same level of education), but also increases dissatisfaction: 23% of employed people expressed a desire to change their employment for better pay, working conditions or stability<sup>23</sup>.

In terms of working conditions, the share of wage employment increased from 44.2% in 2010 to 46.7% in 2016, but the incidence of vulnerable employment was high at 48.1% in 2016. The rate was particularly high for women (62.7%)<sup>24</sup>. At the same time, 11.3% of employed people were in a situation of underemployment in 2016. According to the SAHWA survey data<sup>25</sup>, young people face great precariousness and fragility on the labour market: 73.3% of active young people (15 to 29-year-olds) work without a contract and are not registered in any system of medical coverage.

A recent study by the High Commission of Planning, entitled *Matching education and employment*, measured the mismatch between education level and type of employment, providing details for each type of qualification. In general, it appears that 45.7% of the active population are in a work situation where their diploma matches their employment, 7.6% are working below their qualification level and 46.7% are in employment above their qualification level. This high percentage of people in employment above their qualification level indicates a significant need for training to enhance the efficiency of the workforce and contribute to economic growth and competitiveness<sup>26</sup>.

### 3.2 Employment policy and institutional setting

Employment policy is shaped by the Employment Strategy 2015–2025, which prioritises young people and women and aims to create at least 200 000 jobs each year between 2015 and 2025. The Plan for Employment Promotion 2018–2021 (Plan National de Promotion de l'Emploi) establishes five strategic goals: supporting employment creation; matching education and training with the needs of the labour market; intensifying and consolidating ALMPs; improving the functioning of the labour market and working conditions; and supporting the regional dimension of employment. Each strategic goal includes a series of measures.

In an effort to address inclusion and job creation, different ministries have committed to specific sector development strategies on: (i) youth integration, which plans to improve the training system and integrate young people in the labour market through internship or skills matching<sup>27</sup>; (ii) micro enterprise promotion, which intends to support micro enterprise financing. On the demand side, many sectoral plans aim to promote job creation through macroeconomic and sectoral policies (e.g. compensation reform, flexible exchange rate policy, pro-growth sector strategies).

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<sup>22</sup> Ministère du Travail et de l'Insertion Professionnelle (MTIP), Bilan Social, 2016.

<sup>23</sup> See <http://documents.worldbank.org/curated/en/477441523251051211/pdf/125041-WP-ENGLISH-PUBLIC-Summary-labor-market-note.pdf>

<sup>24</sup> ILO statistics database.

<sup>25</sup> Kamal, Abdelhak, *National youth policies, the case of Morocco under the EU funded SAHWA project*, 2016

<sup>26</sup> Haut Commissariat au Plan, *L'adéquation entre la formation et l'emploi*, 2018, see <https://www.hcp.ma/downloads/>

<sup>27</sup> Ministry of Youth and Sports, *Strategie Nationale Intégrée de la Jeunesse 2015–2030*.

The Ministry of Labour and Professional Insertion, previously the Ministry of Employment and Social Protection, is in charge of labour market regulation, employment and social protection policies. The number of staff in the ministry has gradually decreased since 2010, affecting central services more than regional services. Several agencies operate under the auspices of the ministry: the National Agency for the Promotion of *Employment* and Skills (Agence nationale de promotion de l'emploi et des compétences, ANAPEC), the National Social Security Fund (Caisse nationale de sécurité sociale, CNSS) and the National Fund of Social Welfare Organisations (Caisse nationale des organismes de prévoyance sociale, CNOPS).

A number of consultative councils, most significantly the Higher Council for Employment Promotion, are involved in the development and monitoring of employment policies. The council provides guidance to the government on its employment strategy and is responsible for promoting and developing regional employment. It has regional and provincial branches.

ANAPEC is in charge of implementing ALMPs and providing intermediation services. ANAPEC consists of a general directorate and 79 decentralised agencies. In 2015, the agency launched its 2020 Vision, which includes plans to double the number of agencies in its network; provide better support for young graduates, especially those in long-term unemployment; and expand services to women and non-graduates. In January 2018, with the support of GIZ, ANAPEC launched four mobile employment agencies (known as *anajit*) in four pilot provinces<sup>28</sup>. However, a recent study by the Euro-Mediterranean Network of Economic Studies (EMNES) indicates that the agency's performance is not effective as it focuses on the quantity and not the quality of employment and targets only a limited proportion of jobseekers: less than 1% of all registered jobseekers in Morocco found a job through ANAPEC. It has also been found that there is limited awareness of its existence among jobseekers<sup>29</sup>.

The Plan for Employment Promotion sets out measures to improve employment services. Targeted support measures are put in place. These include guidance and counselling, information portals, catalogues of training offers and training opportunities (e.g. qualifying training, apprenticeships). Several actions are planned to identify the typology of unemployed people and target as much as possible their specificities. Specific non-technical training, which will focus on entrepreneurship skills, job search techniques, soft skills, basic training in ICT and foreign languages, is also planned. This non-technical training is expected to be financed by the regions, the regional councils, the National Human Development Initiative (Initiative Nationale pour le Développement Humain, INDH), international donors and big enterprises.

ALMPs are implemented through a set of targeted programmes with specific objectives. ANAPEC currently implements four programmes: the *Taehil* programme, which aims to increase employability through training; the *Idmaj* programme, which supports the transition of young people from school to work through placements in companies; the *Moukawalati* programme, which supports self-employment through the creation of micro enterprises; and the *Tahfiz* programme, which aims to promote employment through incentives to enterprises and newly created associations. The Ministry of Labour and Professional Insertion provides an analysis of the programmes based on their quantitative objectives. However, the lack of a performance-based evaluation system makes it difficult to assess whether different ALMPs are effective and produce any medium- to long-term impact. In 2016, the ministry looked in particular at the progress made on women's economic autonomy. The data showed

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<sup>28</sup> Tanger-Tetouan-EI HOceima, Fez-Meknes, Rabat-Salé-Kenitra, l'Oriental

<sup>29</sup> See [http://www.euromed-economists.org/wp-content/uploads/2017/10/EMNES\\_Study\\_001-Institutions-and-labour-markets-in-the-Southern-Mediterranean-countries.pdf](http://www.euromed-economists.org/wp-content/uploads/2017/10/EMNES_Study_001-Institutions-and-labour-markets-in-the-Southern-Mediterranean-countries.pdf)

that the female participation rate differs significantly, ranging from 65% for the *Taehil* programme to 21% for the self-employment programme.

The Plan for Employment Promotion intends to consolidate and strengthen existing ALMPs. In particular, employment support contracts will be improved; they will include 'training for placement' contracts; contracts for professional integration, including for jobseekers with special needs; and contracts to support self-employment. The support is intended to move closer to jobseekers, making use of existing local and/or territorial resources that include 'territorial support centres' (centres de proximité), ANAPEC's regional centres and 'youth homes' (maisons de la jeunesse). They will provide information and guidance on the various employment support measures available. The plan looks ambitious considering the rather short time frame for its implementation (2018 to 2021), the number of actors involved and the actions planned. Mechanisms for close monitoring and follow-up of the implementation will have to be developed.

Information on the labour market is available and monitoring of labour market trends has been improved with the creation of a Labour Market Observatory within the Ministry of Labour and Professional Insertion. The observatory is fully operational with a multidisciplinary team of 25, a dedicated budget and its own premises. The establishment of the observatory was an important step in the gradual construction of an integrated observation system for the labour market with a network of observatories at central, sectoral and regional level. The observatory has already published annual reports on the labour market, thematic monthly newsletters and bulletins and technical papers. Nonetheless, the observatory has only limited access to microdata, such as the national labour force survey. More work is needed to develop an integrated system, improve local and sub-national data collection and analysis, and establish structured mechanisms for the systematic use of the information produced in shaping education and training provision. To improve this situation, the observatory would need to work closely with the National Statistics Office and develop partnerships and clear protocols for data use and exchange.

# MOROCCO - STATISTICAL ANNEX

Annex includes annual data from 2012, 2016 and 2017 or the last available year

	Indicator		2012	2016	2017
1	Total Population (000) <sup>(1)</sup>		32,185	34,487	34,851
2	Relative size of youth population (age group 15-24, %) <sup>(1)</sup>		27.2 (2014)	26.1	25.6
3	Youth Dependency ratio (%)		42.6	41.9	41.6
4	Old Dependency ratio (%)		9.4	10	10.3
5	Global Competitive Index	Rank	70	70	71
		Score	4.1	4.2	4.2
6	GDP growth rate (%)		3.0	1.2	4.1
7	GDP per capita (PPP) (current international \$)		6916	7857	8217
8	GDP by sector (%)	Agriculture added value	12.3	13	M.D.
		Industry added value	26.4	29.7	M.D.
		Services added value	53.5	57.4	M.D.
9	Poverty headcount ratio at \$2 a day (PPP) (%)		M.D.	M.D.	M.D.
10	Gini index (%)		M.D.	M.D.	M.D.
11	Educational attainment of adult population (aged 25-64 or 15+) (%)	Low <sup>(2)</sup>	81.8	81.7 (2015)	M.D.
		Medium	9.7	10.5 (2015)	M.D.
		High	7.5	7.9 (2015)	M.D.
12	Gross enrolment rates in secondary education (%)		69.7	69.1 (2012)	M.D.
13	Share of VET students in secondary education (%)		6.1	6.0 (2012)	M.D.
14	Gross enrolment rates in upper secondary education (%)		54.9	54.5 (2012)	M.D.
15	Share of VET students in upper secondary education (%)		11.6	11.6 (2012)	M.D.
16	Low achievement in reading, mathematics and science – PISA (%)	Reading	N.A.	N.A.	N.A.
		Mathematics	N.A.	N.A.	N.A.
		Science	N.A.	N.A.	N.A.
17	Participation in training/lifelong learning (age group 25-64) by sex (%)	Total	M.D.	1.0	M.D.
		Male	M.D.	1.1	M.D.
		Female	M.D.	0.9	M.D.

	Indicator		2012	2016	2017
18	Early leavers from education and training (age group 18-24) by sex (%)	Total	M.D.	M.D.	M.D.
		Male	M.D.	M.D.	M.D.
		Female	M.D.	M.D.	M.D.
19	Activity rates by sex (aged 15+) (%)	Total	48.4	46.4	M.D.
		Male	73.6	70.8	M.D.
		Female	24.7	23.6	M.D.
20	Employment rates by sex (aged 15+) (%)	Total	44.1	42.0	M.D.
		Male	67.2	64.5	M.D.
		Female	22.3	21.0	M.D.
21	Unemployment rates by sex (aged 15+) (%)	Total	9.0	9.4	M.D.
		Male	8.7	8.9	M.D.
		Female	9.9	10.9	M.D.
22	Unemployment rates by educational attainment (aged 15+) (%)	Low <sup>(3)</sup>	6.4	M.D.	M.D.
		Medium	18.1	18.3	M.D.
		High	18.1	22.0	M.D.
23	Youth unemployment rates by sex (aged 15-24) (%)	Total	18.6	22.5	M.D.
		Male	18.4	22.0	M.D.
		Female	19.2	22.8	M.D.
24	Proportion of long-term unemployed out of the total unemployed (aged 15+) (%)		64.8	67.2	M.D.
25	Long-term unemployment rate (aged 15+) (%)		5.9	6.4	M.D.
26	Incidence of self-employment (%)		53.5	50.5	M.D.
27	Share of the employed in a public sector (%)		8.7	8.1	M.D.
28	Employment by sector (%) <sup>(4)</sup>	Agriculture	39.2	38.0	M.D.
		Industry	21.4	21.1	M.D.
		Services	39.3	40.8	M.D.
29	Employment in the informal sector <sup>(5)</sup>		37.3 (2007)	M.D.	M.D.
30	Proportion of people aged 15–24 not in employment, education or training (NEETs), by sex (%)	Total	30.6	27.5	M.D.
		Male	M.D.	11.7	M.D.
		Female	M.D.	44	M.D.
31	Public expenditure on education (as % of GDP)		M.D.	4.7	M.D.

	Indicator	2012	2016	2017
32	Public expenditure on education (as % of total public expenditure)	M.D.	23.6	M.D.
33	Skill gaps (%)	30.9 (2007)	31.8 (2013)	M.D.
34	The share of SMEs in GDP (%)	M.D.	M.D.	M.D.
35	The share of SMEs in employment (%) <sup>(6)</sup>	21.6 (2002)	M.D.	M.D.

**Last update: 28/08/2018**

**Sources:**

Indicators 1, 2, 17, 19, 20, 21, 23, 24, 25 (only 2016), 26, 27, 28, 29, 30 – Haut-Commissariat au Plan

Indicators 3, 4, 6, 7, 8 – World Bank, World Development Indicators

Indicator 5 – World Economic Forum

Indicators 11, 22, 25 (only 2012) – EUROSTAT

Indicators 12, 13, 14, 15: UIS UNESCO

Indicators 31, 32 – Ministry of Education, Training, Higher Education and Research

Indicators 33 – World Bank, Enterprise surveys

Indicator 35 – International Financial Corporation

**Legend:**

N.A. = Not Applicable

M.D. = Missing Data

**Notes:**

<sup>(1)</sup> estimates

<sup>(2)</sup> Includes no schooling

<sup>(3)</sup> ISCED 0-1 (does not include no schooling)

<sup>(4)</sup> employment by sector does not sum up to 100 due to those employed not classified.

<sup>(5)</sup> does not include the agriculture

<sup>(6)</sup> definition: up to 199 employees

## ANNEX: INDICATORS' DEFINITIONS

	Description	Definition
1	Total population (000)	The total population is estimated as the number of persons having their usual residence in a country on 1 January of the respective year. When information on the usually resident population is not available, legal or registered residents can be considered.
2	Relative size of youth population (age group 15-24) (%)	The ratio of the youth population (aged 15–24) to the working-age population (usually aged 15–64 or 15–74).
3	Youth Dependency ratio (%)	The ratio of younger dependants (people younger than 15) to the working-age population (those in the 15–64 age group).
4	Old Dependency ratio (%)	The ratio of older dependants (people older than 64) to the working-age population (those in the 15–64 age group).
5	Global Competitiveness Index	The Global Competitiveness Index assesses the competitiveness landscape providing inside into the drivers of countries' productivity and prosperity. It expressed as scores on a 1 to 7 scale, with 7 being the most desirable outcome.
6	GDP growth rate (%)	The annual percentage growth rate of GDP at market prices based on constant local currency.
7	GDP per capita (PPP) (current international \$)	The market value of all final goods and services produced within a country in a given period of time (GDP), divided by the total population, and converted to international dollars using purchasing power parity (PPP) rates.
8	GDP by sector (%)	The share of value added from Agriculture, Industry and Services.
9	Poverty headcount ratio at \$2 a day (PPP) (%)	The percentage of the population living on less than \$2.00 a day at 2005 international prices.
10	Gini index (%)	Gini index measures the extent to which the distribution of income (or, in some cases, consumption expenditure) among individuals or households within an economy deviates from a perfectly equal distribution. A Gini index of 0 represents perfect equality, while an index of 100 implies perfect inequality.
11	Educational attainment of adult population (25-64 or aged 15+) (%)	Educational attainment refers to the highest educational level achieved by individuals expressed as a percentage of all persons in that age group.
12	Gross enrolment rates in secondary education (%)	Number of students enrolled in a given level of education, regardless of age, expressed as a percentage of the official school-age population corresponding to the same level of education.
13	Share of VET students in secondary (%)	The proportion of VET students in secondary education out of the total number of pupils and students in secondary education (general + VET)
14	Gross enrolment rates in upper secondary education (%)	Number of students enrolled in a given level of education, regardless of age, expressed as a percentage of the official school-age population corresponding to the same level of education.
15	Share of VET students in upper secondary education (%)	The proportion of VET students in upper secondary education out of the total number of pupils and students in upper secondary education (general education + VET)



	Description	Definition
16	Low achievement in reading, maths and science – PISA (%)	The share of 15-years-olds falling to reach level 2 in reading, mathematics and science.
17	Participation in training/lifelong learning (age group 25-64) by sex (%)	The share of persons aged 25–64 who stated that they received education or training in the four weeks preceding the (LFS) survey.
18	Early leavers from education and training (age group 18-24) by sex (%)	The percentage of the population aged 18–24 with at most lower secondary education who were not in further education or training during the four weeks preceding the (LFS) survey. Lower secondary education refers to ISCED 1997 level 0–3C short for data up to 2013 and to ISCED 2011 level 0–2 for data from 2014 onwards.
19	Activity rates by sex (aged 15+) (%)	Activity rates represent the labour force as a percentage of the population of working age.
20	Employment rates by sex (aged 15+) (%)	Employment rate represents persons in employment as a percentage of the population of working age.
21	Unemployment rates by sex (aged 15+) (%)	Unemployment rate represents unemployed persons as a percentage of the labour force.
22	Unemployment rates by educational attainment (aged 15+) (%)	Educational levels refer to the highest educational level successfully completed. Three levels are consider: Low (ISCED level 0-2), Medium (ISCED level 3-4) and High (ISCED 1997 level 5–6, and ISCED 2011 level 5–8)
23	Youth unemployment rates by sex (aged 15-24) (%)	Youth unemployment rate represents young unemployed persons aged (15-24) as a percentage of the labour force (15-24).
24	Proportion of long-term unemployed out of the total unemployed (aged 15+) (%)	Number of unemployed persons aged 15+ who are long-term unemployed (12 months or more) as a percentage of unemployed persons aged 15+.
25	Long-term unemployment rate (age 15+) (%)	Number of unemployed persons aged 15+ who are long-term unemployed (12 months or more) as a percentage of the labour force aged 15+.
26	Incidence of self-employment (%)	The share of self-employed as a proportion of total employment. Self-employment includes employers, own-account workers, members of producers' cooperatives and contributing family workers.
27	Share of the employed in a public sector (%)	The share of employed in a public sector as a proportion of total employment.
28	Employment by sector (%)	The share of employed in Agriculture, Industry and Services.
29	Employment in the informal sector	Share of persons employed in the informal sector in total non-agricultural employment.
30	Proportion of people aged 15–24 not in employment, education or training (NEETs) (%)	The percentage of the population of a given age group and sex who is not employed and not involved in further education or training.
31	Public expenditure on education (as % of GDP)	Public expenditure on education expressed as a percentage of GDP. Generally, the public sector funds education either by directly bearing the current and capital expenses of educational institutions, or by supporting students and their families with scholarships and public loans as well as by transferring public subsidies for educational activities to private firms or non-profit

	Description	Definition
		organisations. Both types of transactions together are reported as total public expenditure on education.
32	Public expenditure on education (as % of total public expenditure)	Public expenditure on education expressed as a of total public expenditure. Generally, the public sector funds education either by directly bearing the current and capital expenses of educational institutions, or by supporting students and their families with scholarships and public loans as well as by transferring public subsidies for educational activities to private firms or non-profit organisations. Both types of transactions together are reported as total public expenditure on education.
33	Skill gaps (%)	The percentage of firms identifying an inadequately educated workforce as a major constraint.
34	The share of SMEs in GDP (%)	The share of value added from small and medium businesses (SMEs).
35	The share of SMEs in employment (%)	The share of persons employed in small and medium businesses.





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