

# **KEY POLICY DEVELOPMENTS IN EDUCATION, TRAINING AND EMPLOYMENT – MOROCCO 2022**

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# EXECUTIVE SUMMARY

Reports assessing Morocco's education all indicate that while the country is making moderate progress, the system continues to fail the country's most vulnerable people. World Bank data shows that an average of 64% of Moroccan children aged 10 cannot read or comprehend a simple text.

Although nearly every Moroccan child enrolls in elementary school today, just one-third reach the minimum proficiency level in reading by the time they leave. These challenges persist despite high levels of public funding. In 2021, 16.9% of all government spending went towards education, well above the world (14.8%) and OECD (12.4%) averages.

Prior to the COVID-19 crisis, the skills and labour sector received renewed interest from the highest levels of the government, and practical actions visibly impacted its development. For example, the drop-out rate from education (particularly at primary level) has been in steep decline for almost a decade, while the literacy rate has been increasing, all in a context where the Moroccan economy has been either stable or growing for the same period. However, apart from increasing the number of children attending school every year, government policies have done little to address the systemic deficiencies in the sector.

A new Education Reform Plan for 2022-2026 was presented in November 2022 to address these weaknesses. The new reform aims to improve governance, boost the level of engagement among the different stakeholders in the reform process, and rethink the sector's funding. It is composed of 12 specific commitments. In contrast to previous national strategy documents related to education, this particular roadmap emphasises and insists on the need for 'measurable' change. The main objectives aim at improving educational quality and coverage, but also at increasing extra-curricular activities and doing more to prevent drop-outs.

In 2022, the government continued to roll out employment programmes aiming at ensuring that the economic rebound is harnessed to increase employment rates; this has been done with numerous operational successes, which are described in this fiche. Another key development includes the drawing up of a draft law to reform the VET sector, especially in way in which it is governed and financed.

# 1. KEY POLITICAL, DEMOGRAPHIC, ECONOMIC AND SOCIAL CHARACTERISTICS

## Political developments

Given its good geographical location and comparatively sound infrastructure, Morocco aims to position itself strategically as an economic and financial nexus between Europe and Africa. To this end, Morocco has initiated a strategic South-South partnership, founded on co-development and closer cooperation with most of its southern and regional neighbours to make the most of its geographical location and its historical relations with its European and Mediterranean trading partners. This includes exchanges among peers and of expertise to address skills development and climate actions (Hekking, 2020).

The party previously in power, the PJD (*Parti pour la justice et du développement*, often compared to a moderate version of the Muslim Brotherhood in the region), lost most of its parliamentary seats in the 2021 general election. The new prime minister, billionaire businessman Aziz Akhannouch, announced that he would implement a break from the previous government with a greater focus on reducing poverty. The Economist Intelligence Unit classifies Morocco as a 'hybrid democracy' and its democracy index has been steadily increasing for the last 15 years.

With respect to the year 2022, Morocco has made considerable efforts to consolidate foreign policy advances. It has rejoined the African Union, signed bilateral agreements with the Gulf Cooperation Council, and improved its relations with the European Union in order to obtain 'advanced status'.

## Demographics

Although both the fertility and mortality rates in Morocco are continuing to decrease, the population is gradually growing, by approximately half a million people every year. It rose from just over 32 million in 2012 to 37 million in 2021 (HCP, 2021b). The upward trend in the Moroccan population is projected to continue for over a decade (CERED, 2017).

The age distribution is also changing, with the pre-school and school-age populations projected to shrink and the active population expected to grow until 2050. This implies that the demographic trend in Morocco – like those of its regional neighbours and following on from the 'youth bulge' of the 2000s – is one of an increasingly urban (64.6%), ageing population, which is likely to result in a shift in pressure from the school system towards the labour market and social security systems (Engelhardt-Wölfler et al., 2018). The latter will be particularly affected by the growth of the senior cohort (aged 60+), which is expected to double over the next three decades, rising to 23.2% of the total population in 2050, compared with just 9.4% in 2014. The current share of young Moroccans (15 to 24 years old) in the population is 25%, which is also the SEMED (southern and eastern Mediterranean) average (ETF, 2021a).

Morocco has a long history of emigration, with 8.6% of Moroccans living outside Morocco (ETF, 2021a). Moroccan migrants have historically had low to medium skill levels, but in 2019, over a third of them had a tertiary education (HCP, 2021b). For this reason, a possible brain drain is now given more consideration in human capital development policies. The substantial number of outward migrants mostly comprises men seeking employment abroad. Women are more likely to move from rural to urban areas, in most cases as a result of their spouses' departure. The yearly number of working migrants has increased continuously, from 53 000 in 2000 to 98 600 in 2019 (UNDESA, 2019). The majority of migrant workers move to the EU (70.7% to France and 24.4% to Spain), but some make their way to the United Arab Emirates (3% – MTIP, 2017). The main driver behind this is work, which accounted for 47.4% of migrants in 2019 (ETF, 2021a).

## Key economic developments

Global shocks and the drought slowed the Moroccan economy in 2022, and inflation increased substantially (8% in the third quarter of 2022 – HCP, 2022) but growth is expected to recover in 2023 albeit in a very uncertain international environment (IMF, 2022).

According to the World Bank (2022), after a 6.3% contraction in growth in 2020 (although similar findings in other countries show that this is far from exceptional), the economy posted a 7.4% growth in real GDP during 2021, boosted by an agricultural rebound following abundant rainfall. The service sector and the large tourism industry have yet to fully recover from the pandemic.

SME make up 99.7% of Moroccan businesses create 37.8% of the added value and represent 73.7% of declared employment, according to the 2021 yearly report by *l'Observatoire Marocain de la TPME* (OMTPME, 2021).

The reforms identified in the SME Policy Index (OECD/EU/ETF, 2018) suggest that Morocco could inspire other economies in the region to improve their policies towards SMEs. For example, since 2002 it has had an operational SME law (*Charte de la petite et moyenne entreprise*), which determines the most important policy principles, including the establishment and responsibilities of an SME agency, the recognition of associations for the support of SMEs at local, regional and national levels, and support mechanisms. However, many challenges remain, such as a reliance on low value-added activities, the informal economy, under-employment and unemployment. The assessment also observes that regional development efforts need to be strengthened with regard to creating conditions for entrepreneurs to prosper.

Morocco has the most stable investment climate and diversified economy in the region. In 2019, 57% of the value added was produced by the services sector, which is a major contributor to the economy. Tourism accounted for 12% of GDP and 12.9% of total employment, according to the World Travel & Tourism Council, and has been a major source of growth. It is currently unclear whether this sector can fully recover from the pandemic (AfDB, 2021).

The government initiated the rollout of the economic roadmap announced by King Mohammed VI in July 2020. In February 2021, the government reformed laws to strengthen social protection and public health outreach to the entire population, and established the Mohammed VI Fund, which supports these services and SMEs through PPPs.

In the World Bank's Doing Business report for 2020, Morocco moved up seven places and ranked 53rd. Areas that have improved include paying taxes (less costly), dealing with construction permits (streamlined administrative procedures) and trading across borders (easy to import/export, including paperless customs clearance).

An ILO publication (2018), which is the only source of statistics for the informal economy in Morocco and is based on 2017 data, claims that almost 80% of employment is in the informal economy.

The economy depends on sectors – agriculture, fisheries and tourism – that are highly sensitive to climate change. Morocco is a water-scarce country with agriculture consuming around 80% of its water resources, as most land is in arid and semi-arid areas. The 2020-30 Green Generation strategy aims to increase agricultural resilience to climate change, including through skills development.

In May 2021, a New Development Model was unveiled, prioritising: (i) structural reforms to boost competitiveness and private sector development; (ii) improving the quality of education and health services to boost human capital; (iii) accelerating the decentralisation process; and (iv) preserving natural resources. Notably, it aims to double its GDP in 12 years and includes the targets of doubling the number of women in employment (from 22% in 2019) and raising the rate of 15-year-old students skilled in basic reading, mathematics and science from 27% to 75% by 2035.

1 January 2021, marked the launch of the African Continental Free Trade Area (AfCFTA), a free trade agreement that includes 54 African countries and aims to accelerate economic integration and expand intra-continental trade.

Morocco is the second-largest recipient of remittances among developing countries in the region. Despite the concentration of Moroccan expatriates in Europe, the United States leads the list of countries from which remittances are sent (14%), followed by Saudi Arabia (12%) and France (10%) (KNOMAD, 2021).

## Key social issues

Prior to the COVID-19 crisis, the skills and labour sector received renewed interest from the highest levels of government, and practical actions visibly impacted its development. For example, the drop-out rate from education (particularly at primary level) has been in steep decline for almost a decade and the literacy rate has been increasing, all in a context where the Moroccan economy has been either stable or growing, also for over a decade.

The combination of the pandemic and a 2-year drought led to an increase in poverty. Despite the positive outlook, the crisis has led to Morocco going back to poverty numbers seen in 2014, with 3.2 million additional people across the country being classed as vulnerable. The rate of vulnerability recorded a decline from 12.5% in 2014 to 7.3% in 2019, before rising to 8.9% during the confinement period in 2020 (HCP, 2021). Morocco is gradually rebounding from this crisis, yet the improvement in macroeconomic indicators has not helped in tackling social inequalities. Another dry agricultural season and the impact of the war in Ukraine on prices have put aggravated pressure on poor and vulnerable people.

In times of crisis, people with disabilities, who represent 6.8% of the Moroccan population (i.e. 2.3 million), are already among the most vulnerable groups in the country (MSFFDS, 2014). It is estimated that two thirds of them do not have access to any social protection and that of those who do, a large majority are affiliated to RAMED (Moroccan Medical Assistance Scheme for the most vulnerable families) (MEFRA, 2020).

Social inequality (measured through the Gini index) saw an increase of two percentage points between 2019 and 2020 (38.5% to 40.3% at national level and 30.2% to 31.9% in rural areas). The rate of absolute poverty increased from 1.7% in 2019 to 3% in 2021 (although it is as high as 6.8% in certain rural areas). In parallel, economic vulnerability also expanded, going from 7.3% in 2019 to 10% in 2021 (17.4% in rural areas and 5.9% in urban settings) (HCP 2021b).

Although the country's score on the Human Development Index (HDI) rose from 0.608 in 2009 to 0.686 in 2019, Morocco was ranked 121st out of 189 countries and territories, thus positioning the country in the medium development category. Morocco's score on the Gender Inequality Index was 0.454, ranking it 111th out of 162 countries. Only 18.4% of parliamentary seats are held by women, and only 21% of women are active in the labour market, compared to 70% of Moroccan men (Bertelsmann Stiftung, 2022).

## 2. EDUCATION AND TRAINING

### 2.1 Trends and challenges

#### Education strategy and legal framework for education

The most recent overarching national strategy addition is the very ambitious ‘New Development Model’, which complements the previous set of national strategies and policies and aims at elevating Morocco up into the top third of the various global rankings by 2035 and strengthening its ambition to be a regional role model. Objectives include doubling per capita GDP by 2035, ensuring that more than 90% of pupils master elementary skills and competencies by the end of primary school, bringing the informal employment rate down to 20%, boosting the participation rate of women from 22% in 2019 up to 45%, and achieving a satisfaction rate of over 80% among citizens with respect to the administration and public services.

Moreover, the Ministry of Education has launched an ambitious reform programme to improve the sector’s overall performance, in line with the 2015-2030 Education Sector Vision, which lays the ground for a ‘new Moroccan school’. The 2015-2030 reform of the education sector has set as objectives more equitable access to education across the nation, focusing on the inclusion of girls, and equal opportunities to raise the level of education in the country.

The corresponding 2022-2026 roadmap covers three areas of interest and lists 12 specific commitments. It aims at improving governance, boosting the level of engagement of the different stakeholders in the reform process, and rethinking the sector’s funding.

In April 2022, the Minister for Education presented yet another roadmap entitled ‘Quality Education for All’, to further reform the sector. In the field of tertiary education, 2022 also saw the start of the implementation of the ‘*Plan d’accélération de la transformation de l’écosystème de l’enseignement supérieur, de la recherche scientifique et de l’innovation* (Pacte ESRI 2030)’.

During the reporting period, an EIB loan of EUR 102.5 million was committed to help finance the construction and fitting-out of 150 community schools in several Regional Education and Training Academies. This operation has a budget of EUR 23.3 million financed by the EU, including an investment grant of EUR 14 million and technical assistance of EUR 9.3 million to support the project’s implementation.

#### Education expenditure

The education expenditure as a percentage of GDP has continuously increased over the last few years for which data is available (4.6% in 2015, 5.9% in 2019 and 6.8% in 2020). When measured as percentage of total public expenditure, then the latest figures are 15.5% in 2019, 14.8% in 2020 and 16.9% in 2021 (World Bank World Development Indicators database).

#### Access, participation and early school leaving

Since 2018, Morocco has been implementing a large-scale programme to broaden access to quality pre-school education. In just a few years, the country has significantly increased the pre-school enrolment rate, from 50.89% in 2018 to 59.87% in 2021. During that period, 13 594 new pre-school classrooms were created throughout the country (UNESCO, 2022).

Net secondary school enrolment has been increasing for over a decade. From a rate of 50% in 2010, it reached 68.5% in 2020, and is even slightly higher for girls, at 69.3%. Similarly, the tertiary education enrolment rate has continuously increased since the early 2000s (UNESCO, 2021).

According to data released by the World Bank, an average of 70% of children under the age of 10 are unable to read a simple text in the North Africa and Middle East region. In Morocco, despite the commendable advances mentioned above, the average stands at 64.9% (World Bank, 2022).



The Higher Council for Education, Training, and Scientific Research (CSEFRS) published alarming figures exposing the rate of school dropouts in Morocco. 431 876 students dropped out of public schools in 2018 without obtaining a school certificate. The number represents 78% of students who had studied at primary and lower-secondary schools, which are supposed to keep children in school until at least the age of 15 (CSEFRS, 2019). The report does not differentiate between VET paths.

## **PISA results**

The most recent PISA test was conducted in 2018. In reading literacy, 15-year-olds in Morocco score 359 points compared to an average of 487 points in OECD countries. On average, 15-year-olds score 368 points in mathematics compared to an average of 489 points in OECD countries. The average performance in science was 377 points, compared to an average of 489 points in OECD countries. The average difference between advantaged and disadvantaged students in reading is 51 points, compared to an average of 89 in OECD countries. However, 13% of disadvantaged students are academically resilient, compared to the OECD average of 11% (OECD, 2018).

## **Young people not in employment, education or training (NEET)**

The latest available data refers to 2020 and should therefore be interpreted with caution, as this was the year of the pandemic-related lockdown. That year, the national rate of people not in employment, education or training was 26.6%. Disaggregated by gender, the rate was 39.7% for women and 13.9% for men. Although these figures are some of the highest in the world, the rate has kept decreasing yearly since 2015.

## **2.2 Initial VET and adult learning**

### **Strategic and legal framework for initial VET and adult learning**

Government policy is contextualised in the 2015-2030 Strategic Vision for Reform, addressing four major purposes: equity and equality of opportunities, quality for all, promotion of the individual and society, and efficient leadership and renewed attainment of change.

The main focuses of the 2015-2030 Strategic Vision for Reform (i.e. integration and consolidation of the VET centre network) have been translated into the Framework Law on Education. This law safeguards the integrity of the Strategic Vision from political and institutional risks, constitutes a national pact that is binding for all parties, and provides a legal basis for further development and implementation. This was then further supplemented by the roadmap dedicated to improving VET, which was approved by King Mohammed VI in April 2019, .

As explained previously, the most recent overarching national strategy addition is the very ambitious 'New Development Model', which complements the previous policy corpus and aims to elevate Morocco up to the top third of the various global rankings by 2035, enabling it to further strengthen its ambition to be a regional role model. Objectives include doubling per capita GDP by 2035, ensuring that more than 90% of pupils master elementary skills and competencies by the end of primary school, bringing the informal employment rate down to 20%, boosting the participation rate of women from 22% in 2019 up to 45%, and achieving a satisfaction rate of over 80% among citizens with respect to the administration and public services.

In terms of performance review, the 2015-2030 Strategic Vision for Reform has led to the development of a national assessment framework to be utilised regularly to record progress related to the reform's objectives. This is now being followed up by evaluations at regional level (CSEFRS, 2021a). For this purpose, the Education Council, which is responsible for monitoring the reform, has drawn up a 'regional index for education development'. The composite index brings together 157 indicators organised into three dimensions corresponding to the reform's objectives, i.e. equity, quality and promotion.



The National VET Strategy 2021 aimed at continuously increasing the number of VET graduates (public, private, youth and adults included) and the quality of their learning, targeting reaching over 2 million graduates per year, compared to just over half a million in 2015. At the time of drafting this fiche, it was not yet possible to confirm whether this milestone has been achieved, due to lack of data.

## VET governance and financing arrangements

As of 2020, there were over 2 000 VET centres in the country; almost a quarter are in Casablanca and 72% are operated by the private sector (this proportion has been increasing for a number of years). The share of VET students in secondary education has consistently increased over the past decade. In the 2019-2020 academic year, nearly 400 000 learners attending VET courses throughout the country (DFP, 2020). This represents 15% of secondary level students, and is therefore still comparatively low. The figure was just over 300 000 in 2015 (DFP, 2015).

Public VET is mainly funded by the private sector, corresponding to 1.6% of its salary expenditure, which amounts to over MAD 2.4 billion per year (equivalent to EUR 218 million). These resources are collected by the CNSS (*Caisse Nationale de Sécurité Sociale*). This amount is mostly spent on initial training, with 30% spent on adult education.

Largely due to the upcoming establishment of 12 '*Cités des Métiers et des Compétences*' (CMCs) and the need to fund their operations, the Minister for Economic Inclusion, Small Business, Employment and Skills announced plans to propose a draft law to the Parliament in 2023 to renew the VET system's objectives, finances, monitoring mechanisms and governance. Therefore, changes can be expected in the near future.

## Qualifications, validation and recognition

Morocco's National Qualifications Framework (NQF) is comprehensive, covering all types of education and training qualifications, and is structured in eight levels. It features elements of a modern qualification system, including outcome approaches, while systematic quality assurance measures are established. The 2019 Education Law refers to the NQF, which is also included in various pieces of education and training legislation.

Although there is awareness among stakeholders, economic sectors and education providers, the NQF is not yet fully operational. In order to operationalise it, the NQF would need to be populated with qualifications under the responsibilities of different bodies into a national database of qualifications, linking all qualifications and making them more accessible and understandable.

The NQF Steering Committee and the NQF Permanent Committee were entrusted with strategic guidance and coordination for NQF implementation respectively. The daily management and the governance and coordination of the system should also be strengthened. This is particularly important now that the responsibilities for compulsory education, higher education, vocational training and adult learning are scattered among different ministries. In conclusion, Morocco's NQF is still at the adoption stage and has not really moved to the activation stage.

In order to support lifelong learning, initiatives to validate non-formal and informal learning, and a credit system, should be reinforced.

## Quality and quality assurance

Both higher education institutions and their programmes must obtain official approval, although the process differs slightly between public and private institutions. The National Agency for Evaluation and Quality Assurance of Higher Education and Scientific Research (*Agence Nationale d'Évaluation et d'Assurance Qualité de l'Enseignement Supérieur et de la Recherche Scientifique*, [ANEAQ](#)) is responsible for the accreditation process. The ANEAQ evaluates applications to create new public and private universities and other higher education institutions, as well as applications for the accreditation of academic programmes. It issues [summary reports](#), which inform the accreditation deliberations of the National Commission for Higher Education and Coordination (*Commission Nationale de*

*Coordination de l'Enseignement Supérieur*, [CNCES](#)), a regulatory body composed of both public- and private-sector stakeholders. On the basis of CNCES's recommendation, the Ministry for Higher Education, Scientific Research and Innovation (ENSSUP) publishes final accreditation and authorisation decisions in official ministerial notes.

The ANEAQ assesses academic programmes on the basis of [national teaching standards](#) established for different fields and qualifications. Programmes meeting these standards are granted accreditation for 5 years (Sanga, 2022).

The Ministry's Department for Vocational Training has sole responsibility for quality assurance of the training system, from designing quality assurance measures to implementing them in close collaboration with all concerned stakeholders. Some notable measures include sectoral studies in certain sectors, which ensure that labour needs are regularly and systematically known (since 1987), while specific QA rules and guidelines are being designed and adapted for each type of VET provider (public/private, etc.). The education roadmap and the Framework Law on Education provide for the establishment of a strengthened quality assurance system with procedures that will be set out in the implementing legislation currently being drawn up. Moreover, training programmes are being developed using a competence-based approach.

At vocational training institutions, quality assurance is conducted using a range of mechanisms:

ISO certification of the management processes of certain establishments falls under the responsibility of the *Office de la formation professionnelle et de la promotion du travail* (OFPPT). A self-assessment system was established by the Department for Vocational Training in 2019. This covers a range of areas of assessment to help decision-makers at schools take corrective measures based on regular performance updates. The system is gradually being rolled out to all VET centres throughout the country. Since 2019, the National Qualifications Framework has been checking the quality of qualifications through the governance and operationalisation bodies. The qualifications forming part of the National Qualifications Framework are subject to a predefined quality assurance process. Nevertheless, the quality of learning in public schools has been deteriorating for years, with private establishments continuously increasing their share of the market (World Bank, 2022). The new strategy provides for various measures to address this inequality. For example, starting from September 2022, candidates for primary and secondary school teachers' posts must have at least a bachelor's degree and complete a 1-year 'specialisation' training course. This is to ensure the quality of teachers' training and commitment. As part of the reform, the age limit for applying for a career in public education has been set to 30 years, down from 40 to 45 years in previous recruitment campaigns. This decision has been publicly questioned by the teachers' union and the debate continues at the time of drafting this fiche.

## Work-based learning arrangements

Appropriate laws and administrative frameworks provide for national, regional and local governance arrangements required to optimise work-based learning (WBL) experiences and secure their benefits. These frameworks demonstrate government leadership and can provide mechanisms to engage social partners, workplaces, and students and their parents. They can also be used to establish and support working relations to allow VET institutions to engage with the local community (e.g. advisory committees) and to provide relevant technical vocational education and training (TVET) provisions, including accessible and productive WBL arrangements (UNESCO, 2021).

However, despite these commendable institutional achievements, in practice, apprenticeships still lag behind in terms of uptake. For example, of the 191 122 public VET students who graduated in 2019, only 22 072 had done an apprenticeship. Morocco spends little on WBL compared to OECD averages<sup>1</sup>, and moreover, WBL in Morocco includes both WBL and sandwich courses<sup>1</sup>, and each path is governed by a different law and set of bylaws (Law 12.00 and Law 36.90 respectively – GIZ, 2020). This split hinders harmonisation and broad reform efforts. Furthermore, WBL is mostly funded by the state, whereas sandwich courses are mostly funded through the tax levy (1.6% from total salaries). In both

<sup>1</sup> A training course with alternate periods of formal instruction and practical experience.

cases, the OFPPT manages the funds and the implementation, with transparency and coordination having been questioned. Finally, the legal texts exempt three sectors from contributing to the tax levy (agriculture, crafts and mining). These sectors employ a sizable proportion of the labour force and mainly produce exports. Other hindering factors relate to insufficient private-sector engagement and limited career guidance.

## Digital education and skills

Morocco's internet penetration rate stood at 84.1% of the total population at the start of 2022. For perspective, these user figures reveal that 5.96 million people in Morocco did not use the internet at the start of 2022, meaning that 15.9% of the population remained offline at the beginning of the year.

Maroc Numeric 2013 and Maroc Digital 2020 are the two comprehensive strategies aiming to strengthen the digital economy in Morocco. Despite many initiatives (systematically presented by Khalfi, 2021) to integrate digital skills in schools, the domestic evaluation of progress with regard to ICT skills acquisition by students remains poor (ILO, 2021), and teachers' professional development has not improved substantially (CSEFRS, 2014). Structural obstacles were identified and addressed within the education and training system, as were the policies that govern the subject. Nearly all universities are adequately equipped, but the cultural barrier related to the perceived roles of learners and teachers, and making full use of the available tools, have proven to be a major impediment.

Notable interventions include the one by ANAPEC (Morocco's National Agency for the Promotion of Employment and Skills), which has developed a digital strategy based on web-based, telephone and digital media tools to increase the quality of services and the number of young users. Moreover, MARWAN (the Moroccan wide area network) seeks to interconnect all Moroccan universities and educational establishments. The project is dedicated to education, training and research. Its latest version offers universities access to high-speed internet (between 2 and 100 Mbps) thanks to its connection to the 'GEANT' network, which is reserved for academic traffic.

## Statistics on education and training

The *Haut Commissariat au Plan* (High Commission for Planning) is the national statistics office in Rabat. Its website provides data on most dimensions of the social, work, education and health status of its population. However, it is rarely up to date and available data sets are usually from a few years ago. The same is true for data disseminated through the website of the Ministry of Economic Inclusion, Small Business, Employment and Skills. Other reliable sources of information include the National Council for Education, UNESCO and the World Bank, among others.

For example, as part of the *Programme National d'Évaluation des Acquis* (PNEA\_2024), in the second quarter of 2022 the National Council for Education piloted a methodology and assessed the competences of 11 000 students in the first class of secondary school and 14 000 students in the last class of secondary school throughout 700 schools. The objective was to evaluate the educational effects of the newly established management models and whether the ongoing reform was already bearing fruit. At the time of drafting this fiche, the results have not yet been made available.

## 3. LABOUR MARKET AND EMPLOYMENT

### 3.1 Trends and challenges

#### Labour market characteristics

Although employee income doubled between 2000 and 2018, new job generation has not been sustained, and inactivity is a continued obstacle to a thriving society. The Moroccan labour market is characterised by three key challenges: lack of inclusion (women and young people are less integrated into the labour market than adult men), slow job growth, and the prevalence of low-quality and low-skilled jobs. Despite numerous public policies relating to employment, economic growth has not translated into the creation of decent jobs. According to the World Bank, only 129 000 jobs are created annually, while the working-age population is increasing by 300 000 each year (Díaz-Cassou et al., 2021). These historical trends were aggravated by the lockdowns and the current responses are confronted by this year's Ukraine-related growing inflation.

Moreover, the very diverse employment profile presents significant challenges for labour policy. Morocco's economic structure includes some large, formal firms, along with a range of very different workplaces, including small firms operating partly or fully informally, self-employment, domestic work, and unpaid family work. Over a third of the employed labour force is engaged in agriculture. This context is challenging for labour-policy makers since diverse rules and institutions would be needed to reflect the range of realities (Lopez-Acevedo, 2021).

At the end of 2022, the unemployment rate had slightly decreased to 11.4% nationally. It also fell by 1 percentage point in urban areas (down to 15%) and remained at 5.2% in rural settings. An increase in the employment rate for women (17.8% at the end of 2022) and for youths between 15 and 24 years old (31.7%) were some of the positive developments this year. But 2022 also recorded a decrease in the graduate employment rate (now 17.7%) (HCP, 2022).

#### Statistics on and labour market and employment

The ETF observes that much more information has been made available on the *Haut Commissariat au Plan* (the national statistics office) website in the recent past, including statistics from the previous year. From that perspective, this is a significant improvement.

After a slow launch of activities, the National Labour Market Observatory is now fully operational, with a multidisciplinary team of 25 staff, a dedicated budget and its own premises. It is contributing to the ongoing construction of an integrated observation system for the labour market, with a network of observatories at central, sectoral and regional levels. The observatory publishes regular reports on the labour market, themed monthly newsletters, bulletins and technical papers. The online content has kept increasing and the platform is now the main source of employment data and analysis for Morocco.

The EU PIAFE (Integrated Programme for Supporting Training and Education) cooperation programme includes a substantial technical assistance component. One of its ongoing activities is to support the Ministry of Economic Inclusion, Small Business, Employment and Skills in strengthening its data management capability and establishing an information management system that makes it possible to track learners and graduates and their integration into the labour market.

## 3.2 Employment policy and institutional settings

### Strategy and legal framework in the employment policy field

The National Employment Strategy aims to create at least 200 000 jobs per year between 2015 and 2025, with an emphasis on young people and women. It was developed by the Ministry of Economic Inclusion, Small Business, Employment and Skills and adopted by the government in 2015.

The National Employment Strategy was reviewed in 2021 and now includes a government programme and a national action plan, which both run until 2026 and will be reviewed in 2025. The current version proposes making progress on human capital development (including increasing WBL and language skills), labour market governance, job creation and improving activation programmes.

The Strategy's programme had achieved 55% of its objectives by 2020 (with over 200 000 jobs created) before the COVID-19 pandemic disrupted all planned actions. However, the lack of a performance-based evaluation system makes it difficult to assess effectiveness over time (ONMT, 2020). In 2022 for example, 133 000 new jobs were created – a gain of 285 000 jobs in urban areas and a loss of 152 000 in rural areas).

### Initiatives to boost employment

Over the last three decades, an increasing number of initiatives have been rolled out to boost employment in Morocco, primarily to address the country's inability to deploy its labour force in a growing economy. However there have only been a limited number of evaluations of these policies and measures. Despite Morocco introducing the principles of public policy evaluation into its constitution in 2011, institutional progress has not translated into the establishment of a systematic assessment ecosystem (Chatri and Ragbi, 2021).

The current policy landscape for this sector is composed of the following strategies:

The National Employment Strategy promotes decent employment through growth and productive and quality jobs, increasing the participation of young people and women in the labour market and strengthening equality in employment, alongside access to jobs and the reduction of employment disparities between different areas of the country. It targets all economic players in a broad approach that considers the economy while also bearing finances and institutional capacity-building in mind.

The corresponding action plan for 2021 supports job creation in diverse ways, such as tax exemptions for investors if they recruit local youth, public investments being screened for their labour market impact before approval, skill-forecasting mechanisms being strengthened, and support being given to self-employment and civil society organisations. The action plan also aims to improve the skills match on the labour market by deploying specific VET training modules on self-employment and navigating the labour market, increasing foreign language learning and WBL, and training at least 50 000 new VET graduates in the 2021-2022 academic year. The action plan also foresees the strengthening of active labour market policies. For example, the Ministry of Economic Inclusion, Small Business, Employment and Skills is establishing a 'skills passport' to support young graduates in acquiring all required skills and speed up their transition to work. It also foresees the establishment of a number of WBL methods to ensure that all population segments can benefit from it, particularly NEETs. This is in addition to investments aiming at supporting entrepreneurial skills and start-ups. When it comes to improving labour market efficiency, actions include improving the legislation governing the right to strike, social protection of employees and labour inspections. It is also taking measures to simplify employment contract termination and studying legal change requirements to ensure that Morocco can benefit from new forms of work (e.g. platform work).

In 2022, as part of the 2021-2026 government programme, Prime Minister Aziz Akhannouch launched yet another new economic programme entitled 'Awrach'. It aims to create 250 000 jobs by end of 2023. The programme is led through a strategic committee that is chaired by the prime minister himself. The plan has a financial contribution of MAD 2.5 billion and aims to gradually restore employment following the lockdown-related economic downturn. The other programme, entitled



'Forsa', aims to support youth entry into the labour market through individual support and entrepreneurial training.

In order to initiate the development of a new strategic framework for economic inclusion and employment that is in line with the 2021-2026 government programme, the government has partnered with the ILO to review recent progress (mid-term evaluation) of the employment strategy (SNE) as well as the national plan to promote employment (PNPE). The findings are expected during the course of 2023.

### **Initiatives to increase the capacity of the public employment services**

With regard to international cooperation, the bulk of support programmes are designed and implemented with the OFPPT (public VET provider) and the National Agency for the Promotion of Employment and Competencies (ANAPEC), which mediates between employers and jobseekers (Deau, 2021). In 2022, a significant reorganisation of ANAPEC was approved by its line ministry.

ANAPEC is an active public service intermediary in the labour market and currently mainly implements four ALMPs: the Taehil programme aims to increase employability through training (238 600 beneficiaries between 2017 and 2019); the Idmaj programme supports the transition of young people from school to work through placements in companies (900 000 beneficiaries between 2016 and 2019); the Moukawalati programme supports self-employment through the creation of micro-enterprises (2 066 enterprises established and 3 656 jobs created in 2019 alone); and the Tahfiz programme aims to promote employment through incentives to enterprises and newly created associations (9 508 employees and 3 290 enterprises supported in 2019 – ILO, 2021).

The establishment of the Professional Sector Observatory in October 2017, funded mainly by the VET tax, has been an opportunity to foster collaboration with the private sector. It largely operates as a sector-specific skills council and helps identify skills needs in priority economic sectors, with a focus on local needs. Since its founding, dozens of initiatives have been deployed each year, with the observatory supporting skills sectors through methodological tools and technical assistance in reviewing trends in skills requirements in their respective sectors.

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# Morocco: Statistical Annex

The Annex includes annual data from 2010, 2015, 2019, 2020 and 2021 or the last available year.

	Indicator		2010	2015	2019	2020	2021
1	Total population (000s) <sup>(1)</sup>		32 343.4	34 663.6	36 471.8	36 910.6	37 344.8
2	Relative size of youth population (age group 15-24 and denominator age 15-64, %) <sup>(1) C</sup>		29.2	26.4	24.5	24.1	23.9
3	GDP growth rate (%)		3.8	4.5	2.6	-6.3	7.4
4	Gross value added by sector (%)	Agriculture	12.9	12.6	12.1	11.7	12.6
		Industry	25.7	26.1	25.3	26.1	26.8
		Services	51.0	49.7	51.0	50.8	49.1
5	Public expenditure on education (as % of GDP)		M.D.	4.6	5.9	6.8	M.D.
6	Public expenditure on education (as % of total public expenditure)		M.D.	M.D.	15.5	14.8	16.9
7	Adult literacy (%) <sup>C</sup>		66.6 <sup>(2)</sup>	64.1 <sup>(3)</sup>	73.8 <sup>(4)</sup>	M.D.	M.D.
8	Educational attainment of total population (aged 15+) (%)	Low	M.D.	M.D.	M.D.	M.D.	M.D.
		Medium	M.D.	M.D.	M.D.	M.D.	M.D.
		High	M.D.	M.D.	M.D.	M.D.	M.D.
9	Early leavers from education and training (aged 18-24) (%)	Total	M.D.	M.D.	M.D.	M.D.	M.D.
		Male	M.D.	M.D.	M.D.	M.D.	M.D.
		Female	M.D.	M.D.	M.D.	M.D.	M.D.
10	NET enrolment rates in secondary education (ISCED level 2-3) (%)		M.D.	M.D.	66.2	68.5	71.4
11	Share of VET students in upper secondary education (ISCED level 3) (%)		12.2	M.D.	16.0	15.1	11.3
12	Low achievement in reading, mathematics and science – PISA (%)	Reading	N.A.	N.A.	73.3 <sup>(4)</sup>	N.A.	N.A.
		Mathematics	N.A.	N.A.	75.6 <sup>(4)</sup>	N.A.	N.A.
		Science	N.A.	N.A.	69.4 <sup>(4)</sup>	N.A.	N.A.
13	Activity rate (aged 15+) (%)	Total	49.,6	47.4	45.8	44.8	45.3
		Male	74.7	71.5	71.0	70.4	70.4
		Female	25.9	24.8	21.5	19.9	20.9
14	Inactivity rate (aged 15+) (%) <sup>(5) C</sup>	Total	504	52.6	54.2	55.2	54.7



	Indicator		2010	2015	2019	2020	2021
		Male	25.3	28.5	29.0	29.6	29.6
		Female	74.1	75.2	78.5	80.1	79.1
15	Employment rate (aged 15+) (%)	Total	45.1	42.8	41.6	39.4	39.7
		Male	68.0	64.8	65.5	62.9	M.D.
		Female	23.4	22.2	18.6	16.7	M.D.
16	Employment rate by educational attainment (aged 15+) (%)	Low	47.7	M.D.	M.D.	M.D.	M.D.
		Medium	59.6	M.D.	M.D.	M.D.	M.D.
		High	69.2	M.D.	M.D.	M.D.	M.D.
17	Employment by sector (%)	Agriculture	40.3	39.0	32.5	31.3	31.2
		Industry	22.1	20.6	22.5	22.9	22.9
		Services	37.5	40.4	44.9	45.7	45.8
18	Incidence of self-employment (%) <sup>(5) C</sup>		53.8	51.0	47.3	46.6	48.1
19	Incidence of vulnerable employment (%) <sup>(5) C</sup>		51.0	48.8	44.9	44.6	43.7
20	Unemployment rate (aged 15+) (%)	Total	9.1	9.7	9.2	11.9	12.3
		Male	8.9	9.4	7.8	10.7	10.9
		Female	9.6	10.5	13.5	16.2	16.8
21	Unemployment rate by educational attainment (aged 15+) (%)	Low (ISCED 0-1)	6.7	5.9	5.1	7.9	M.D.
		Low (ISCED 2)	16.4	15.4	12.1	15.9	M.D.
		Medium	17.7	19.3	17.2	19.5	M.D.
		High	17.4	21.1	20.9	23.4	M.D.
22	Unemployment rate (aged 15-24) (%)	Total	17.6	20.8	24.9	31.2	31.8
		Male	18.1	20.6	22.0	28.0	28.4
		Female	16.1	21.4	33.4	41.2	41.9
23	Proportion of people aged 15-24 not in employment, education or training (NEETs) (%) <sup>(5) C</sup>	Total	31.4	27.9	26.5	26.6	M.D.
		Male	M.D.	11.4	11.6	13.9	M.D.
		Female	M.D.	45.1	41.7	39.7	M.D.
24	Participation in training / lifelong learning (% aged 15+) <sup>(6)</sup>	Total	M.D.	1.0	M.D.	M.D.	M.D.
		Male	M.D.	1.0	M.D.	M.D.	M.D.

	Indicator	2010	2015	2019	2020	2021
	Female	M.D.	0.9	M.D.	M.D.	M.D.
25	Human Development Index	0.616	0.658	0.686	M.D.	M.D.

Last update: 28.9.2022

**Sources:**

Indicators 1, 2, 3, 4, 5, 6, 7: World Bank, World Development Indicators database

Indicators 7, 10, 11: UNESCO, Institute for Statistics

Indicators 13, 14, 15, 16, 17, 18, 19, 20, 21 (2019-2021), 22, 23, 24: Haut Commissariat au Plan

Indicator 12: OECD PISA 2018 Results (Volume I) Annex B1

Indicator 21 (2010, 2015): Eurostat

Indicator 25: UNDP

**Notes:**

(1) Estimation.

(2) Applies to 2011.

(3) Applies to 2014.

(4) Applies to 2018.

(5) ETF calculations of HCP data.

(6) Age range differs from 25-64; data refers to employees who have benefited from training organised by their employer in the previous 12 months.

**Legend:**

C= ETF calculations

N.A. = Not applicable

M.D. = Missing data

# KEY DONOR PROJECTS IN EDUCATION, TRAINING AND EMPLOYMENT

The table below provides an overview of current projects in the field of education, training and employment. Please note that this list is not exhaustive.

Promotor	Name of the project	Purpose and main partners
AFD Agence Française de Développement	Employment and Skills Development project  Vocational Education and Training projects	Construction of 25 vocational training centres in high-potential economic sectors. Ensure a better match between market needs and the skills of Moroccans. Promote job creation: supporting the development of Moroccan companies (microenterprises and SMEs), in particular in the agricultural sector.
IsDB Islamic Development Bank	Literacy and Skills Development Programme	Development of (i) basic literacy; (ii) apprenticeship training; and (iii) microfinance  VET department of the Ministry of Economic Inclusion, Small Business, Employment and Skills
Cooperation Canada	Canada's international development programme in Morocco aims to reduce inequality and poverty among the most vulnerable people, especially women and girls.	The international development programme focuses on: <ul style="list-style-type: none"> <li>• enterprise development and livelihood support with a focus on the inclusion of women in agricultural value chains;</li> <li>• improving the quality of education and vocational training, particularly among young people in order to increase their employability and meet the needs of the labour market;</li> <li>• economic empowerment of women through open markets and green economy;</li> <li>• human dignity by improving the sexual and reproductive health of women and girls, in addition to gender awareness and the fight against gender-based violence.</li> </ul>
GIZ	Tamheen II  Development of Vocational Training at the Workplace	<ul style="list-style-type: none"> <li>• Support for regulatory reform and strengthening public-private governance structures</li> <li>• Development of pedagogical tools and training of trainers</li> <li>• Expansion of vocational training at the workplace in 6 regions</li> <li>• Improved access of young people, especially girls, to vocational training</li> </ul> VET department of the Ministry of Economic Inclusion, Small Business, Employment and Skills OFPPT, CGEM, associations
GIZ	CESAR Creation of Employment Opportunities in the Water and Sanitation Sectors	Improve employability and vocational training in the water and sanitation sector.  Ministry of Interior, OFPPT, IFMEREE-Oujda, universities, ANAPEC
Korea International Cooperation Agency (KOICA)		Creation of a Hub Centre for Moroccan trainers in the automotive sector VET department of the Ministry of Economic Inclusion, Small Business, Employment and Skills IFMIA Casablanca: <i>Institut de Formation aux Métiers de l'Industrie Automobile à Casablanca</i>

Promotor	Name of the project	Purpose and main partners
MCA (Millennium Challenge Account) MCC (Millennium Challenge Corporation)	Charaka Fund	The establishment of a vocational training offer driven by private demand through financial support for the creation or extension of vocational training centres adopting a mode of governance in public-private partnership (PPP). 9 new centres and the conversion of 6 existing centres covering key sectors in six regions: Casablanca-Settat, Fès-Meknes, Tanger-Tétouan-Al Hoceïma, Oriental, Béni Mellal- Khénifra and Drâa-Tafilalet
MCA Millennium Challenge Account	Employability Compact Programme	<p>The Education and Training for Employability Project is comprised of two activities:</p> <ul style="list-style-type: none"> <li>The Secondary Education Activity aims at improving the quality of secondary education by piloting a participatory approach to school improvement in 90 schools across three regions of Morocco.</li> <li>The Workforce Development Activity aims at increasing the quality and relevance of technical and vocational education and training (TVET) by supporting private-sector driven governance as well as the construction/rehabilitation of 15 training centres, together with targeted investments in policy reform of the sector.</li> </ul> <p>VET department of the Ministry of Economic Inclusion, Small Business, Employment and Skills OFPPPT, CGEM, ANAPEC</p>
ILO	Regional Project STED-AMT: 'Skills for trade and economic diversification: Alignment of skills with sector development strategies in Algeria, Morocco and Tunisia'	Improve competitiveness and job creation in Algeria, Morocco and Tunisia through the implementation of effective strategies for the development and use of skills in certain economic sectors. Strengthening of collaboration and mutual learning between participating countries.
EU	Programme FORCAP Support the implementation of the national vocational training strategy	<p>Improve governance, soft skills, social inclusion, Information system, training of trainers, national skills competitions</p> <p>VET department of the Ministry of Economic Inclusion, Small Business, Employment and Skills</p>
EU	PIAFE ( <i>Programme Intégré d'Appui à la Formation et Education / Integrated Programme for Supporting Training and Education</i> ) Towards Quality Education and Training	<ul style="list-style-type: none"> <li>Improve the supply of quality education and training and make it accessible to all;</li> <li>Better meet the needs of young people and their professional paths;</li> <li>Strengthen social and societal mobilisation around the education and training system;</li> <li>Improve the efficiency and effectiveness of the education and training system</li> </ul> <p>Ministry of Economic Inclusion, Small Business, Employment and Skills, Ministry of Education, Ministry of Higher Education, Scientific Research and Innovation</p>
UNICEF	Forsa	<p>Strengthening of the quality of education at the secondary level through the integration of citizenship education and life skills in the curriculum and strengthening of the guidance system</p> <p>Ministry of Ministry of Economic Inclusion, Small Business, Employment and Skills</p>

Promotor	Name of the project	Purpose and main partners
USAID	Higher Education Partnership – Morocco	Strengthening the institutional capacities of regional centres for education and training professions (CRMEFs) Ministry of Higher Education, Scientific Research and Innovation
USAID	Inclusive Education Teacher Training Activity	Sustainably improving the performance and capacity of Moroccan higher education institutions and regional teacher training centres (CRMEFs) to provide quality teacher training and professional development in the area of inclusive education for young people, targeting students who are deaf or hard of hearing

Sustainable employment and inclusive growth is one of the three priorities of the EU's current support framework for Morocco (current programme in process of renewal; previous one expired in 2022). The indicative total budget for this new round of aid is EUR 1.6 billion. This is one of the key interventions at present.

The ILO has supported the Government in formulating its national employment strategy for 2015-2025, which has involved a wide array of players at both central and local levels, including social partners. The Spanish Agency for International Development Cooperation, the Canadian International Development Agency, the Swedish International Development Cooperation Agency and the ILO's Regular Budget Supplementary Account have supported the implementation. The African Development Bank also supports this endeavour, but mostly through credit lines and investments.

The Millennium Challenge Corporation supports the employment sector with a budget of some USD 27 million, with the aim of improving the monitoring of the labour market and promoting inclusive employment. This entails three dimensions: promoting inclusive employment for young people and women who are either unemployed or economically inactive, supporting the impact assessment of employment and labour market policies, and promoting gender equity in the workplace.

The World Bank operates many grants and loans in Morocco. With regard to employability, it promotes job creation in the private sector through the creation of a more efficient environment for business and competitiveness; increasing opportunities for private-sector growth, with a focus on micro-enterprises and SMEs and youth employability; and increasing access to finance.

The European Investment Bank (EIB) provided a loan of EUR 102.5 million (more than MAD 1 billion) to finance the construction and fitting-out of 150 community schools in several Regional Education and Training Academies in the Kingdom of Morocco. This operation has a budget of EUR 23.3 million (MAD 245 million) financed by the European Union, including an investment grant of EUR 14 million and technical assistance of EUR 9.3 million to support the project's implementation.

The table below gives an overview of other interventions with related objectives.

Name	Promoter	Purpose and beneficiary
youth@work	ILO, Cooperation Canada	Strengthening the capacity of the OFPPT and NGOs Ministry of Social Development, OFPPT, ANAPEC
Promotion or productive and decent employment for young people	ILO, Spanish Agency for International Development Cooperation	Technical assistance for regional policies, Ministry of Economic Inclusion, Small Business, Employment and Skills
Programme to support suitability of training for employment	AfDB, World Bank, AFD	Budgetary support and technical assistance to increase the employability of young people with degrees, Ministry of Economic Inclusion, Small Business, Employment and Skills
Accessing overseas employment opportunities	World Bank	Promotion of overseas careers ANAPEC
National employment observatory	EU and ILO	Creation of a national job-creation observatory, Ministry of Economic Inclusion, Small Business, Employment and Skills
E4E Initiative for Arab youth	EU	Awareness of labour rights and improved inclusion CGEM, ANPME, Ministry of Employment and Vocational Training
World Bank employability and skills programme	World Bank	Improving tourism centre training courses Ministry of Tourism
Supporting vocational training	AFD	Supporting the creation of an apprenticeship training centre in the automotive sector OFPPT, Ministry of Economic Inclusion, Small Business, Employment and Skills
EconoWin	GIZ	Increasing involvement of women in the labour market through training and advocacy Universities and NGOs
FOR SATY	USAID	Education, professional integration and boosting the capacity of youth organisations Local NGOs, vocational training centres
Graduate Employability	British Council	Improving the employability of graduates and their competitiveness at international level Delegate Ministry of Higher Education
Connecting classrooms project	British Council	Strengthening of language and teaching skills for English language teachers Ministry of Economic Inclusion, Small Business, Employment and Skills
Increasing income for single mothers	CODESPA Foundation	Hairstylist training for single mothers at the 100% Mamans association in Tangier
Integration for vulnerable persons	CODESPA Foundation	Guiding young people towards non-formal education and apprenticeships Ministry of Economic Inclusion, Small Business, Employment and Skills

Name	Promoter	Purpose and beneficiary
Micro-entrepreneurship for disadvantaged young people in the informal sector	World Bank	Awareness and entrepreneurship training for young people aged 15-30 Ministry of Youth and Sports
Entrepreneurship for rural youth	CODESPA Foundation	Support to NGOs training rural youth in entrepreneurship Fondation OCP
SEDPL2	World Bank	Ensuring training is suitable for employment, entrepreneurship and guidance Ministry of Economic Inclusion, Small Business, Employment and Skills, Ministry of Education, Delegate Ministry of Higher Education
Min Ajliki	Belgium	Development of female entrepreneurship in Morocco (awareness leading up to creation and development) ANAPEC, Ministry of Education, NGOs, including AFEM
Results-based financing employment programme	Millennium Challenge Account – Morocco	Development of a performance-based approach to support private intermediation Companies and NGOs



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