NEW FORMS OF WORK AND PLATFORM WORK IN SEMED

Country profile: Morocco

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Setting the scene

Main economic indicators

Morocco is considered one of the most competitive economies in Africa, and ranks 5th in terms of Gross Domestic Product (GDP) volume.[1] However, Morocco's economic growth has not been sufficiently labour-intensive to absorb its growing working-age population. The country is also characterised by a large informal sector, high rates of economic inactivity, low levels of female participation in the labour force, the prevalence of low value-added services, and a difficult business environment, especially for start-ups and young firms.

In 2021, Morocco's economy was recovering from the impact of the COVID-19 pandemic, which had caused a contraction of 7% in 2020. The government implemented measures to support the economy, including tax relief, loan guarantees and financial assistance to affected businesses. As a result, the economy rebounded during the first half of 2021, with the GDP growth of 13.5% during the second quarter.

The main sectors of Morocco's economy are agriculture, tourism, aerospace/automobiles, phosphates and textiles. The Moroccan economy largely depends on agriculture, which provides the majority of low-productivity jobs, usually in the form of unpaid family work lacking social and medical coverage. Meanwhile, the automotive industry has managed to establish itself as a flagship business sector. According to the Department of Economic Studies and Financial Forecasts,[2] this sector has proved to be sufficiently well integrated into global value chains to become the country's leading export sector, accounting for 26% of national exports and 27% of industrial employment in 2018. Moroccan authorities have aimed to strengthen the country's position in this industry in order to attract further foreign investment and increase industrial capacity through 2023.[3]

Compared with other countries in the Maghreb region, migration abroad of Moroccans is the most intense in terms of numbers of migrants and the most diverse in terms of the number of destination countries. The number of Moroccans living abroad reached 5.4 million in 2020, while the total population living in Morocco is around 36.7 million. In the same context, Moroccans abroad are also the nationals who transfer the most income to their home country. International migration, through its economic and social effects, has become an important dimension of Moroccan society. Remittances sent by Moroccan nationals represent an important stream of revenue in the Moroccan balance of payments. Over the last decade, they have represented some 7% of Moroccan GDP, that is, around USD 7 billion per year. They peaked in the year 2021 when they exceeded USD 9 billion. The first nine months of 2022 also showed an increase in remittances of more than 11% compared with the same period in 2021, which had already seen a strong increase compared with previous years.[4]

While being regarded as a country of outward migration, Morocco has also become a more important destination for migrants either for residence or transit, due to its proximity to Europe. By 2017, data indicated that the stock of migrants and refugees in the country was slightly more than 95,800.[5] Statistics reveal that 41.6% of these migrants came from African countries, while 40% came from European

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[1] Ministére de l'Economie, des Finances et de la Réforme de l'Administration (2020). Projet de Loi de Finances pour l'année budgétaire 2020, p.34.

[2] Ministére de l'Economie, des Finances et de la Réforme de l'Administration (2020). Projet de Loi de Finances pour l'année budgétaire 2020.

[3] Lopez-Acevedo G., Betcherman G., Khellaf A., and Molini V., World Bank Group (2021). Morocco's Jobs Landscape. Identifying Constraints to an Inclusive Labor Market, available at: Morocco Jobs Landscape (worldbank.org)

[4] Haut-Commissariat au Plan (2022). Déterminants des transferts et des investissements des migrants marocains à l'étranger, available at: Déterminants des transferts et des investissements des migrants marocains à l'étranger (hcp.ma)

[5] Migrants Refugees (2020). Migration Profile: Morocco. https://migrants-refugees.va/it/wp-content/uploads/sites/3/2021/05/2020-CP-Morocco.pdf

countries. In terms of the nationalities most represented, French migrants come first at 25.4%, followed by Senegalese (7.2%), Algerians (6.8%) and Syrians (6.2%).[6]

Labour market

According to the Moroccan Statistics Agency, three main features characterise the labour market in the country: lack of inclusion, low job creation, and low quality of jobs.[7] Furthermore, according to a report by the institute Legatum, the organisation of work in Morocco presents a real challenge. The country ranks 96th in the ranking of prosperity, and 86th for flexibility of work.[8]

In 2021, the total level of economic activity in Morocco stood at 45.3%. The issue of gender disparities in the labour market persists as a serious challenge, resulting in lower levels of participation among women, at 20.9%, compared to men at 70.4%.[9] The participation rate is particularly low among the women in urban areas (16.6%).[10]

The table below draws a comparison between the unemployment situation in the years 2022 and 2023. The most notable features include the 15-24 age category suffering the highest rate of unemployment, with 49% in urban areas and an aggregate rate of 35%, and the female unemployment rate being seven percentage points higher than that of men during the first quarter of 2023.[11]

Table 1. Unemployment by demographic groups in 2022 and 2023

	Quarter I year 2022			Quarter I year 2023		
	Urban	**Rural**	**Aggregate**	**Urban**	**Rural**	**Aggregate**
Unemployment						
Unemployment (%)	16.3	5.1	12.1	17.1	5.7	12.9
• By gender						
Male	13.4	5.6	10.5	14.7	6.0	11.5
Female	26.3	3.5	17.3	25.3	4.8	18.1
• By age						
15-24	47.7	16.5	33.4	49.6	18.9	35.3
25-34	25.0	7.1	19.2	27.1	7.6	20.9

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[6] Lafeur, J.M., & Vintila, D. (eds.) (2020). Migration and Social Protection in Europe and Beyond (Volume 3). A Focus on Non-EU Sending States.

[7] Moroccan Statistics Agency Haut Commissariat au Plan (2017). The Labour Market in Morocco: Challenges and Opportunities

[8] The 2023 Legatum Prosperity Index[TM] | www.prosperity.com Country Report Morocco (2023).

[9] KIESE database.

[10] International Labour Organization (2023).

[11] Haut Commissariat au Plan (2023). Notes d'Information du Haut Commissariat au Plan relative à la Situation du Marché du Travail au Premier Semestre de 2023. La situation du marché du travail au premier trimestre de 2023 (hcp.ma)

35-44	8.6	2.7	6.5	9.4	2.6	7.1
45+	5.2	1.4	3.6	5.2	1.8	3.8
• By education						
Non-degree	7.5	2.3	4.6	7.8	2.6	4.9
Degree	20.8	12.0	18.9	21.7	13.0	19.8

With the creation of 150,000 jobs in urban areas and the loss of 174,000 jobs in rural areas, the national economy lost a total of 24,000 jobs between 2021 and 2022, after having lost 432,000 jobs under the conditions of the COVID-19 pandemic in 2020, before created 230,000 jobs in 2021. Morocco's service sector contributed to the creation in 2022 of 164,000 jobs, while the industrial sector (including crafts) contributed 28,000 new jobs. Meanwhile, agriculture, forestry and fisheries lost 215,000 jobs, and the construction sector lost 1,000 jobs.[12]

Like most developing countries, the level of informality in Morocco's job market is high. Undeclared work has played an important role in the process of job creation in Morocco over the last decade. The informal economy contributed between 30% and 40% of Morocco's GDP in 2017. Nearly 80% of workers worked in the informal sector, carrying out manual or domestic labour, driving taxis, or working as street vendors.[13] Moreover, the COVID-19 crisis helped to expand this informal economy, as people lost their jobs in companies and consumers sought cheaper goods and services provided by workers who were not registered with the state's pension fund.

Youth statistics

The labour market in Morocco has largely excluded two important groups: youth and women. A large share of Morocco's young people are not working, and nor are they investing in improving their employment prospects. The share of young people aged 15-24 not in employment, education or training (NEETs) in Morocco was estimated at 26.6% in 2020,[14] which was close to the region's average (31.5%) but higher than the world average (23.3%).[15] The rate was considerably higher among women than men (39.7% vs 13.9%, respectively).[16] The phenomenon of NEETs suggests there is a large number of economically inactive and discouraged young people, which can hamper their long-term ability to acquire skills and contribute to the country's economic and social future.

The school-to-work transition in Morocco faces various challenges, as a result of the following factors:

- A high rate of youth unemployment and NEETs: for the majority of educated people, it is very difficult to get a job. Morocco' slow rate of employment growth is failing to keep pace with the influx of individuals entering the working-age population.

- The labour market shows a concerning lack of inclusion when it comes to women and young people; in particular, female participation in the labour force remains disproportionately low.

- Few opportunities are available to receive information about job prospects and the skills needed.

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[12] Assahifa (2023), Services sectors in Morocco created 164K jobs in 2022, available at: https://www.assahifa.com/english/morocco/services-sectors-in-morocco-created-164k-jobs-in-2022/
[13] Haut Commissariat au Plan, & World Bank (2017). Le marché du travail au Maroc: Défis et Opportunités..
[14] KIESE database.
[15] OECD (2023). Making Development Happen, Volume 8. Agro-food Jobs for Youth in Egypt, Morocco and Tunisia. https://www.oecd.org/dev/Agro-food-jobs-youth-Egypt-Morocco-Tunisia-Development-centre.pdf
[16] KIESE database.

- Lack of soft skills: 45% of companies complain that candidates do not possess the necessary non-technical or soft skills.[17]

High-skilled job seekers face high unemployment rates in Morocco, as in other SEMED economies. While it is impossible to overlook the 'demand side' argument, which focuses on the economy's incapacity to provide highly skilled jobs, this problem also highlights the low quality of education.

Over the past 20 years, Morocco has experienced a sharp increase in the availability of educational services, which has led to notable advancements in terms of access to education, enrolment, and achievement. Between 2000 and 2016, gross enrolment rates in lower-secondary education rose from 60% to 88%, in the upper secondary education from 37% to 66%, and in basic education from 85% to 98%.[18] Weak outcomes in national and international student learning evaluations[19] show that this has not improved learning, however. To eliminate skills mismatch, Morocco has relied more and more on enhancing and expanding the vocational training system, with a large increase in both the number of trainees and the network of institutions.

Internet and digitalisation

In recent years, Morocco has made considerable advances in digitalisation, with an increasing emphasis on technology and innovation as the major forces behind economic growth. In 2020, the Moroccan government announced the launch of the Digital Morocco 2020–2025 initiative, the goal of which is to make the nation a digital hub for the African continent. This policy seeks to:

- transform interactions with the public administration, via the end-to-end digitalisation of priority citizen/business journeys;
- establish Morocco as a reference Digital & Technological Hub at African level; and
- put digital at the service of a more inclusive and egalitarian society, with a reduction in the digital divide.[20]

Morocco has adopted various strategies and initiatives to accelerate its digital transformation, such as 'Maroc Numeric 2013' and 'Maroc Digital 2020'. Dedicated bodies have been set up in this area, such as the Digital Development Agency (ADD) and the National Commission for the Control of Personal Data Protection (CNDP). Based on reports by the ANRT (the national telecommunications regulation body), the number of subscribers to mobile telephony has increased by an average of more than 10% each year, reaching 49.2 million subscribers[21] by the end of 2020. ANRT has also reported a 17% increase in the total number of the internet subscribers, bringing the number to nearly 30 million in 2020, and increasing the penetration rate to 83%. With regard to the number of 4G mobile subscribers, the same report shows an increase of more than 30% to approximately 20.5 million in 2020. Meanwhile, subscribers to Morocco's fibre-optic network increased by nearly 80% year-on-year in 2020, to more than 218,000 users.[22]

A real gap in awareness levels exists between job seekers and recruiters. More than 85% of human resource managers indicate that the need for ICT profiles and talent will increase over the next five

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[17] UNESCO-Huawei. Digital Talent Review - A Huawei initiative (2021). Bridging the Gap: Matching Digital Skills and the Employability Pipeline in Morocco. https://en.ichei.org/Uploads/Download/2021-06-23/60d2e8159c9c8.pdf

[18] Sanga, O. & Mackie, C. (2022). Education in Morocco, Education in Morocco (wes.org)

[19] TIMSS 2019 Encyclopedia (2019). Education Policy and Curriculum in Mathematics and Science.

[20] UNESCO-Huawei. Digital Talent Review - A Huawei initiative (2021). Bridging the Gap: Matching Digital Skills and the Employability Pipeline in Morocco, 2021. p.6. https://en.ichei.org/Uploads/Download/2021-06-23/60d2e8159c9c8.pdf

[21] Morocco's mobile phone user penetration rate is above 130%.

[22] Morocco World News (2021).Moroccans Who Have Access to Internet Reached 29 Million in 2020, available at: https://www.moroccoworldnews.com/2021/03/336924/moroccans-who-have-access-to-internet-reached-29-million-in-2020

years. Meanwhile, 38% of those already in the labour market and 50% of students express a negative and pessimistic view of the current labour market.[23]

[23] UNESCO-Huawei. Digital Talent Review - A Huawei initiative (2021). Bridging the Gap: Matching Digital Skills and the Employability Pipeline in Morocco. https://en.ichei.org/Uploads/Download/2021-06-23/60d2e8159c9c8.pdf

Online work on and off digital labour platforms

Online work has become a widespread practice in Morocco among various demographic groups. The pandemic has accelerated this dynamic in the labour market, which has allowed greater flexibility and the adoption of distance and online work. From highly skilled engineers or doctors to graduates with a Bachelor's or technical degree, all of kinds of professionals (as well as high school students) use online work, with different motivations. For students, ranging from high school to college, it provides a source of income that can be used to purchase personal gadgets such as computers and smartphones. However, in most cases this income cannot be considered either as regular or tantamount to a living wage, given the fact that these students only work online when they are off school. As we will discuss further in this report, the category of full online workers is made up of people who mostly specialise in IT development and deal with more complex assignments.

On-location platform work is more visible in Moroccan society than online work on platforms. Deliverers of food and other goods who work for on-location platform companies are found in popular places such as supermarkets and fast-food outlets, where they can be seen accepting or waiting for orders. In addition, they are visible in the streets and avenues, as they wearing uniforms and carry bags that bear the visual identity of the company for which they work. The relative invisibility in society of online work is because those who practice it are educated people who work for companies that are situated either in country or abroad; on-location platform work, meanwhile, is the subject of a debate in society and in the media.

The following sections of this report outline the available data on the prevalence of online freelancing on and off digital labour platforms in Morocco, the motivations of workers to commence freelancing activities, the main worker profiles, as well as working conditions.

Prevalence of online work

Based on data provided by the OLI,[24] engagement in online work in Morocco has shown a consistent upward trend between 2017 and 2023, with some fluctuations. Notably, there was a significant spike in worker activity in the middle of 2022, followed by a sharp decline. The most recent measurement in May 2023 indicates that worker engagement has increased by approximately 410% compared to the initial measurement made in June 2017. During this period, the activity of Moroccan workers has represented approximately 0.245% of the global platform work across the platforms measured. This positions Morocco as the third-largest supplier of online platform work in the SEMED region, behind Egypt and Lebanon.

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[24] http://onlinelabourobservatory.org/oli-supply/

Figure 1. Change in engagement of Moroccan online platform workers over time relative to June 2017
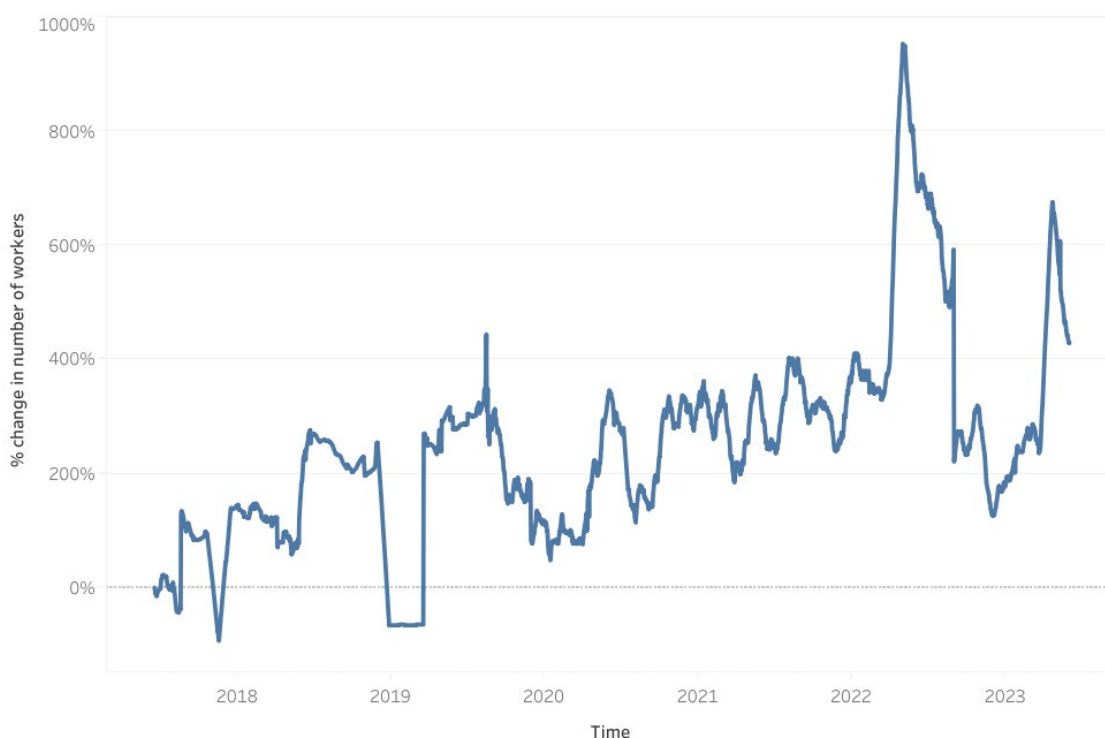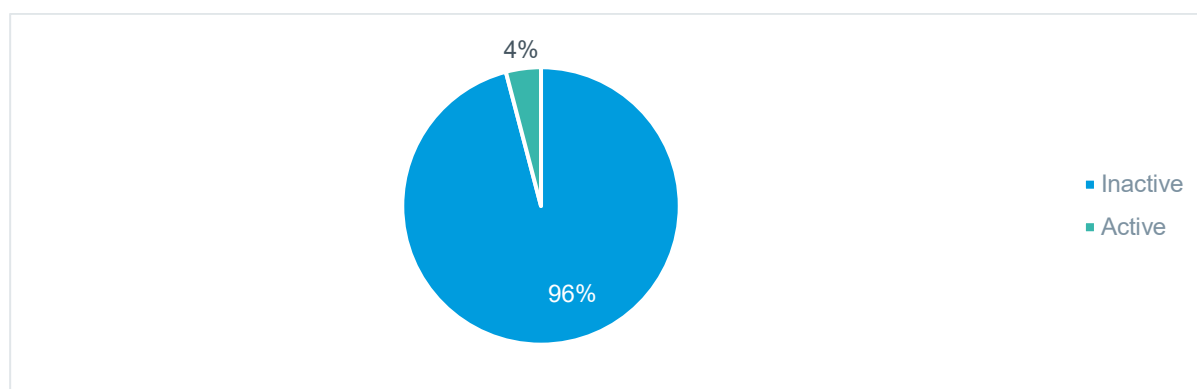

Source: Online labour index.[25]

Note: the graph presents the percentage change between the number of active workers from Morocco on a specific day, compared with the number of active workers at the start of data collection in 2017, which is used as a reference date. This graph was based on OLI data that calculated a weighted estimate of currently active workers by periodically sampling workers on five of the largest online platforms once every 24 hours. The analysed platforms are Upwork, Freelancer, Fiverr, Peopleperhour and MTurk.

Data collected for this study from the platforms Freelancer, Guru and PeoplePerHour indicates low rates of activity among registered workers, and their concentration on one platform. Among the 23,273 registered workers from Morocco across the three targeted platforms, only 4% can be considered active[26] (see Figure 2 below). The majority of active workers (87%) worked on Freelancer, while PeoplePerHour and Guru account for only 12% and 1% of workers, respectively.

Figure 2. Proportion of active and inactive online platform workers

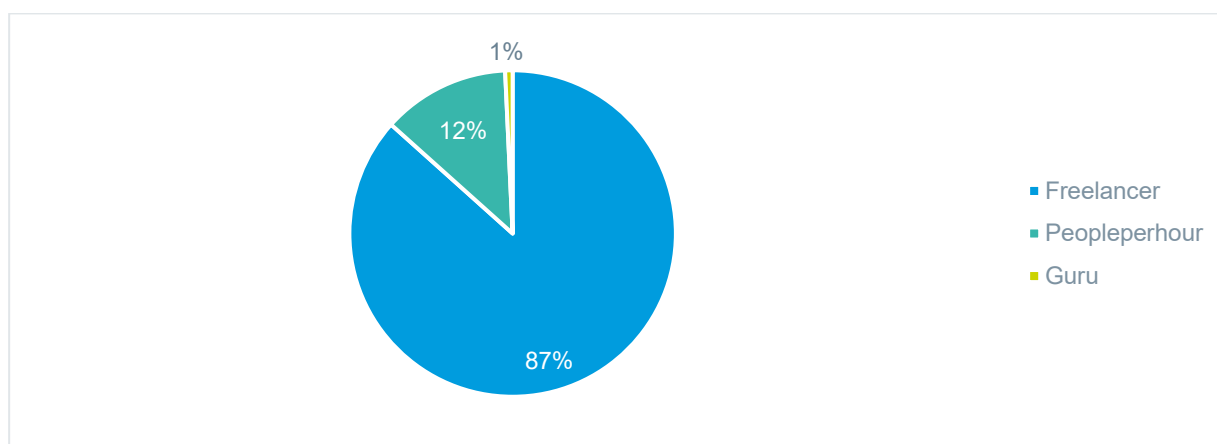Source: PPMI, based on data from Freelancer, Guru and PeoplePerHour collected in March 2023.

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[25] Online Labour Index: http://onlinelabourobservatory.org/oli-supply/
[26] Active workers are considered to be those who have completed at least one task on a digital platform.

Figure 3. Proportion of active online platform workers per platform

Source: PPMI, based on data from Freelancer, Guru and PeoplePerHour collected in March 2023.

Attractiveness of online work

Two main factors influence the popularity of online work on platforms. The first is attractive remuneration. Online workers receive a salary that is not capped, and for the same assignment, an online worker can earn at least 40% more than a permanent employee.[27] In some cases, this figure may be double if the online worker possesses skills in high demand that are difficult to find in the labour market. It is noteworthy that this category mostly includes the graduates of elite engineering schools. The second motivation is the autonomy, or freedom, that this status offers in terms of carrying out work from home, especially for women who care for children or live in a city in which urban mobility is difficult.

The factors discouraging online work include the fact that orders are not guaranteed all the time and competition is tough, and it may happen that a freelancer spends a long period of time without income. One digital marketing expert who was interviewed stated that Moroccans working online face fierce global competition that often offers much lower prices. Another discouraging factor is that online workers have to manage all their own tasks in relation to administration, insurance and pension scheme, and keep the books, which can be very time-consuming. Lastly, there is also the issue of organisation and discipline, with not all workers being able to manage multiple projects autonomously.

Online work occupations and worker profiles

The most popular platforms for online workers serve a number of different occupations. These platforms include:

- International platforms: www.fiverr.com, www.freelancer.com, www.guru.com, www.upwork.com, www.toptal.com

- Regional platforms www.welink.ma, www.mission-freelance.ma, www.khamsat.com, www.homsys.ma, www.freelancer.ma, www.jobbers.ma.

These platforms have adopted a business model that relies on brokering deals between the suppliers of services and customers, and thus earning a commission. Their revenue stream is based on offering different types of subscription plans to workers and clients.[28] The typical clients of these platform

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[27] Comment Morocco (2020, February). How to freelance in Morocco? https://comment.ma/travailler-freelance-au-maroc

[28] International Labour Organization (2021). World Employment and Social Outlook: The Role of the Digital Platforms in Transforming the World of Work. Available at: World Employment and Social Outlook 2021: The role of digital labour platforms in transforming the world of work (ilo.org)

workers are individuals seeking a unique service, as well as Moroccan small and medium-sized enterprises (SMEs), large companies, and foreign corporations.

The largest share of the services provided by Moroccan online freelancers go to the IT sector, which is also the most notable sector of online work in the public discourse. The list of services provided is long, and includes up to 50 services, according to interviews conducted for this study. Examples include: web/database development and management (PHP, HTML, website design, WordPress, e-commerce, AngularJS, JavaScript, Node.js, Express JS, WordPress, MySQL, database administration); programming and application development (SQL, Python, AJAX, Android app development); graphic design (logo design, Photoshop, Illustrator, icon design, 2D animation, banner design); content creation (blog writing, content marketing, copy typing, article rewriting, community management); finance (accounting, audit); language teaching and translation. Interestingly, some writing services offered by online platform workers may be considered unethical (drafting Master's or Bachelor's dissertations, drafting reading notes or bibliographies, or drafting whole chapters for a PhD thesis, and so on).

Overall, the distribution of occupations among Moroccan platform workers on the three platforms analysed is uneven, as illustrated in the figure below. Approximately half of workers engage in creative and multimedia work, while 29% are involved in software development and technology. The remaining quarter of workers are distributed across writing and translation, professional services, sales and marketing support, as well as clerical and data entry.

Figure 4. Distribution of occupations among active online platform workers
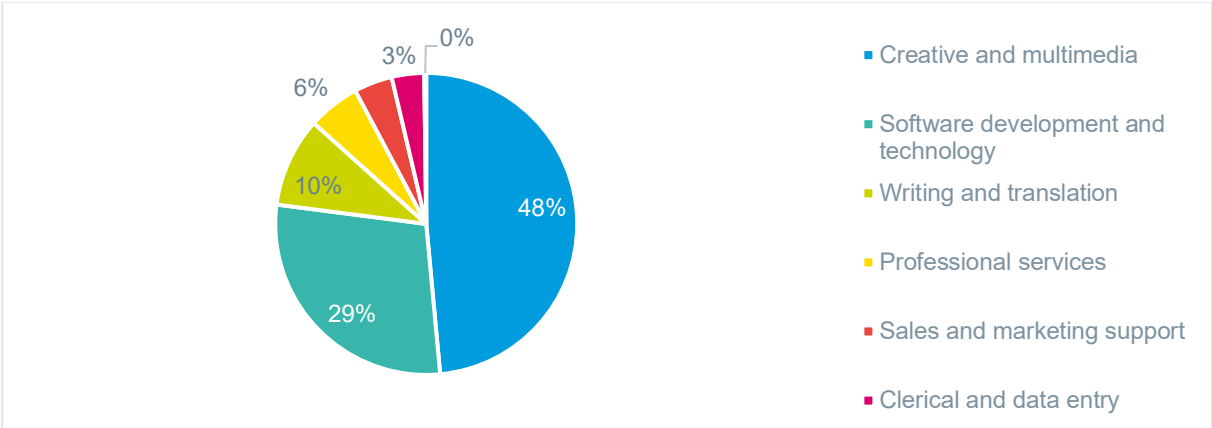
Source: PPMI, based on data from Freelancer, Guru and PeoplePerHour collected in March 2023.

Note: 'Unknown' category shows worker profiles for which occupation could not be identified.

The majority of online platform workers in Morocco are men. Data collected from platforms suggests that men are around six times more likely to work on online labour platforms than women. Men also dominate all six occupations analysed (see figure below). Out of these occupations, women are most represented in writing and translation, clerical and data entry, and sales and marketing support, and least represented in software development and technology.

Figure 5. Gender distribution of active online platform workers by occupation (March 2023)
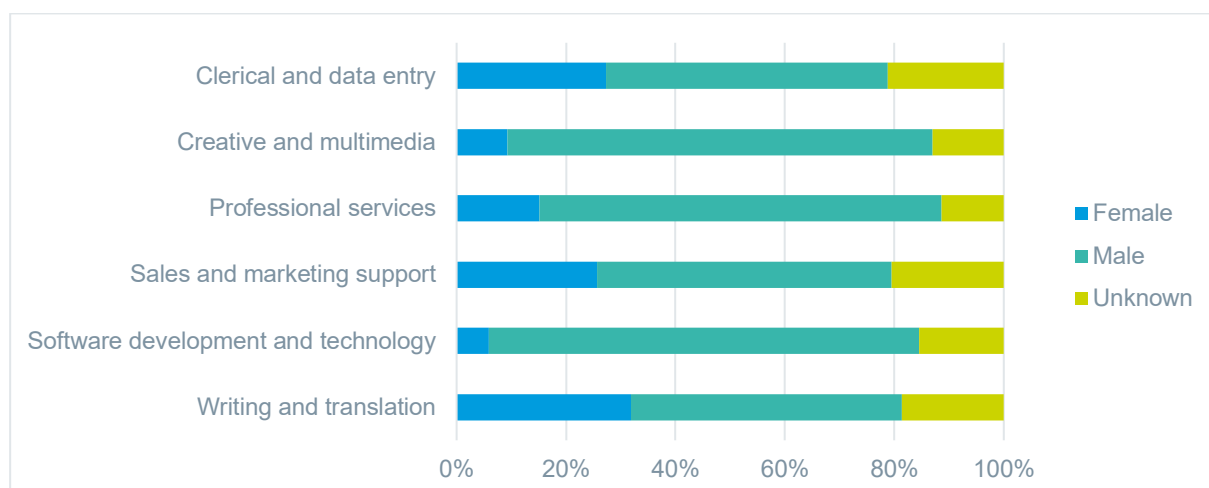

Source: PPMI, based on data from Freelancer, Guru and PeoplePerHour collected in March 2023.

Note: 'Unknown' category shows worker profiles for which gender could not be identified.

Many online freelancers in Morocco chosen the career of freelancer as a full-time job. Nevertheless, many do this as a second job to generate additional income. In cases where freelancing is a full-time job, it is mostly a long-term activity. According to interview conducted for this study, the trend of taking online work as a career path and a full-time job is a global trend that is likely to accelerate in Morocco.

Working conditions

While it is difficult to precisely determine the working conditions of online digital workers in Morocco due to a lack of surveys, some indicators show that they are fairly satisfied with their situation. The main advantages of online work for professionals in Morocco relate to:

- Better pay than 'offline' jobs. Compared with traditional sectors, this type of work is in many respects highly rewarding – a fact that has caused some workers to resign from regular employee status and assume the role of freelancer. According to one interviewee, Mr. Nasser, 'international companies pay better and in USD and maybe in crypto. Freelancers also save by evading taxes'.

- Greater freedom and flexibility, which allow them to achieve work-life balance. According to one interviewee, 'no one gives them a hard time about what time they arrived or left, how they are dressed; they don't have stress on public transport. They can live outside the central cities and pay lower rents.'

In relation to the first of the two points above, the data collected for this study show significant differences in the hourly rates requested by online platform workers in Morocco between different occupations (see Figure 6 below). The highest average hourly rates are in professional services (USD 22.32) and software development and technology (USD 20.66). The lowest rates are in clerical and data entry (USD 12.67), as well as writing and translation (USD 14.88). In addition to occupational differences, differences in earnings are also gender-related, with men requesting higher hourly rates than women. Men are on average request USD 18.56 per hour, while women request USD 16.80.

Figure 6. Hourly rates of active online platform workers by occupation
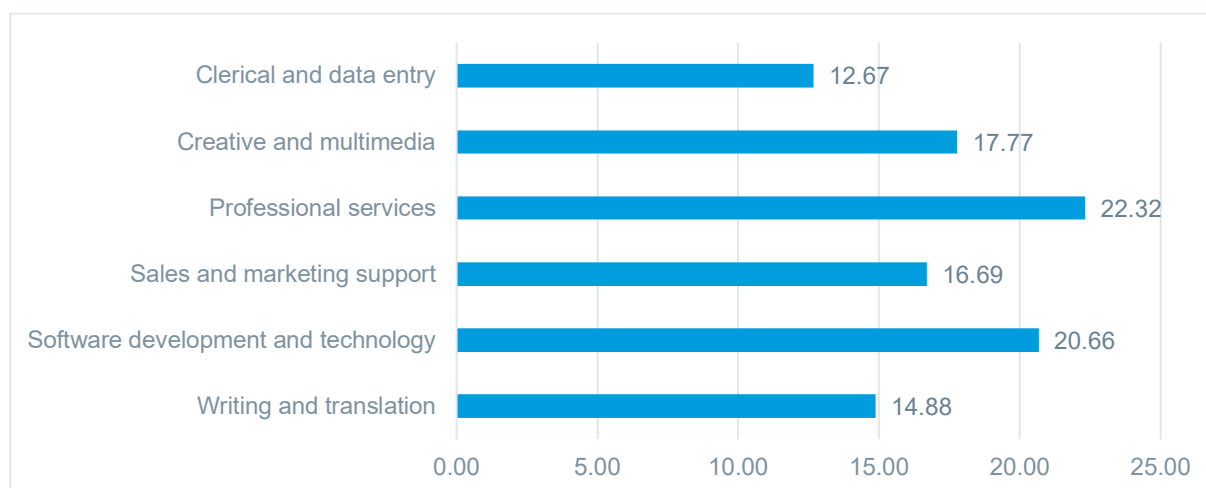
Source: PPMI, based on data from Freelancer, Guru and PeoplePerHour collected in March 2023.

Despite these significant variations in platform earnings, the hourly wages offered on online labour platforms are still significantly higher than local hourly wages in Morocco. According to Numbeo,[29] the average net hourly pay in Morocco in March 2023 was USD 2.44. This amount is around seven and a half times lower than the average hourly wage on the online labour platforms analysed (USD 18.35). It is important to note, however, that these figures are not directly comparable, as requested hourly rates can differ from what workers ultimately receive, and platform earnings are irregular and may include a substantial amount of unpaid work. Nevertheless, these data indicate that online platform work can represent a significant income-generating opportunity for workers in Morocco.

Nonetheless, this employment model is fraught with certain risks, such as the risk of not getting paid by a customer, the work carried out being rejected, or simply a lack of opportunities due to a highly competitive market.[30] Also, at the level of upskilling and learning new skills, online platform workers must rely on themselves to progress and remain relevant in the market, as Mr. Nasser Kettani states in the interview.

Tarik Fadli, Board Member at the International Summit for Smart Cities in North Africa and president of the company 'La Marocaine des e-Services', points to the fact that the CGEM (General Confederation of Moroccan Enterprises) complains that employees desert regular jobs to sell their services at higher costs while working through a proxy agency. A proxy agency acts as a broker between the worker and the company. It negotiates the assignment and budget, and then hires a person to do the job online, on or off the digital platform. The agency takes a commission of around 12% of the total cost of the work assigned to the worker. Depending on the nature of the assignment, the worker may be deployed for a certain time in the premises of the company, e.g. when it involves the integration of an ERP (Enterprise Resource Planning) program.

In online work, many types of contractual relationship are available to workers, the most traditional being a services provision contract ('Contrat de prestations de services'). This existed prior to the emergence of these new types of work, and was originally intended to cover the needs of more traditional assignments such as construction or catering.[31]

When it comes to multinational digital platforms, the entire financial transaction is managed by the platform, and both customers and suppliers are prohibited from sharing their credentials. Some proxy

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[29] https://www.numbeo.com/cost-of-living/country_price_rankings?itemId=105
[30] International Labour Organization (2021). World Employment and Social Outlook 2021: The role of digital labour platforms in transforming the world of work, https://www.ilo.org/wcmsp5/groups/public/---dgreports/---dcomm/---publ/documents/publication/wcms_771749.pdf
[31] Service provision contract template: https://www.start-up.ma/documents-a-telecharger/modele-contrat-de-prestation-de-services/

agencies also exist which act locally on hiring digital online workers for specific missions. These usually take a commission, which can be up to 12% of the net value of the mission. Considering the fact that some online workers choose to adopt the legal status of a one-person company or self-employed so as to be able to charge their customers, the laws that cover the relationship between customers and suppliers in online digital platforms relate to civil law rather than labour law. Thus, although they work as individuals, online workers bear the burden of keeping accounts and managing tax revenues. The most notable hurdle, however, is the law that regulates one-person companies in the services sector (to which the aforementioned workers belong), which prescribes a ceiling of MAD 200,000 (approximately EUR 18,000) in annual turnover. Exceeding this amount would mean that the entrepreneur has to switch to the status of a traditional company, and hence pay all the taxes to which he/she is not subject as a one-person company.[32] In addition, the 2023 finance law has introduced a new provision that imposes a tax of 30% on any transaction which the person carries out with the same client if the amount is higher than MAD 50,000 MAD (approx. EUR 4,500). Indeed, the government deems this measure necessary to protect full-time employment and prevent companies from circumventing various taxes and social contributions by choosing to buy services from one-person companies.[33]

In this context, informality is common among freelancers working through online digital platforms, as the transaction is carried out through the platform. Workers do not feel obliged to declare their activity to the public authorities concerned. However, many such workers have started to receive official warrants from the local justice authorities, which summon them to pay taxes on revenues or face being sued. The law, in effect, allows the administration to gain access to the customers' bank accounts if they suspect tax evasion.

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[32] Doers Morocco. Declaration of the turnover of the self-entrepreneur in Morocco. Déclaration du chiffre d'affaires de l'auto-entrepreneur au Maroc (doers.ma)
[33] Belahouaoui, R. (2023). Auto-entrepreneur : le régime fiscal entre LF 2014 et LF 2023 (leseco.ma), Leseco newspaper.

On-location platform work

On-location platform work has been the subject of public debate and media coverage in Morocco on many occasions. Aside from press releases and articles covering the activities of these platforms, two investigations have been published by the magazines *Le Desk* and *Telquel*. Both have triggered a heated conversation about the working conditions of delivery personnel. *Le Desk*[34] spoke about couriers working under harsh conditions for the platform Glovo, while *Telquel*[35] went even further, describing the delivery workers as 'slaves of the new capitalism'. The writer of the article 'Jumia, Glovo: The Battle of Uberisation' in the economics magazine *Economie et Entreprise*, while focusing on the thriving business of delivery services and the profits made by these international digital platforms, expressed regret that workers do not receive a fair share of this success given their wages, which equal the minimum wage in Morocco, and their lack of social security.

The sections that follow present insights based on the data available regarding the prevalence of on-location platform work, the motivations of workers to commence platform work activities, worker profiles, as well as working conditions.

Prevalence of on-location platform work

The presence of on-location platform work in Morocco dates back to around the year 2016, which saw Uber's entry to the market. The company officially discontinued its services in Morocco in 2018, but maintained a presence through the acquisition of the Emirati-owned company Careem, another ride-hailing business, in 2019. Following Uber's arrival, other platforms emerged that specialised in delivery services. The three best known ones are Glovo, Jumia Food and Yassir. At the time of reporting, ride-hailing and delivery companies are present only in Morocco's big cities, which is why it cannot be assumed that this type of work is widespread across the country.

At the time of reporting, the on-location platforms that declare themselves as Moroccan companies in the sector of ride-hailing services include Roby and TaxiDaba. International companies operating in Morocco include Careem, Yassir (Algeria), Heetch (France), TaxiF (UK), Talixo (Germany), Indrive (USA), and Yango (a Netherlands-registered holding company for the Russian IT conglomerate Yandex LLC). Among delivery applications, the market leaders are Glovo (Spanish) and Jumia Food (registered in Germany, but headquartered in Nigeria), as well as Kaalix and LAD (both from Morocco).

Publicly available statistics at national level mostly cover the financial performance of these companies and the number of salaried people they employ. Therefore, estimates of the number of delivery riders and ride-hailing drivers working through digital labour platforms in Morocco remain unavailable.

Attractiveness of on-location platform work

Aside from the main motivation of ride-hailing drivers and couriers, which is a lack of other employment opportunities, two other important factors are important in making on-location platform work attractive: remuneration (which is estimated to be around 26% higher than in the traditional taxi and delivery sectors, see below), and flexibility.

According to a survey by the ILO, the motivations of ride-hailing drivers vary, with the most common reasons being, in descending order of popularity: 1) a lack of alternative employment opportunities (60%); 2) job flexibility; 3) better pay compared with other jobs; 4) the need to supplement their income; 5) the desire to improve their skills and career prospects; and 6) the fact that they enjoy the nature of

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[34] Le Desk (2022, October). Les Glovers Marocains Livrés à Eux Même. Available at: https://ledesk.ma/grandangle/les-glovers-marocains-livres-a-eux-memes/

[35] Telquel (2022, November). Glovo, Jumia Food, Yassir: Les Livreurs, esclaves du nouveau capitalisme. Available at: Glovo, Jumia Food, Yassir : des livreurs esclaves du nouveau capitalisme ? – Telquel.ma

this work. In the delivery sector, similarly, motivations include: 1) a lack of other employment opportunities (over 70%); 2) job flexibility; 3) better pay; 4) the need to supplement their income, as well as other reasons.[36]

On-location platform work occupations and worker profiles

Ride hailing and delivery are the most prominent occupations among on-location platform workers in Morocco.

In the ride-hailing sector, the majority of workers are male, with only 2% of workers being women. In terms of education, around 2% have primary education, around 16% have lower-secondary education, around 34% have higher-secondary education, around 40% hold a Bachelor's degree, and around 8% possess a post-graduate degree or higher.[37] These figures reveal notable levels of over-qualification for the jobs performed through online platforms.

In the delivery sector, an ILO survey indicates that the workforce comprises 100% men. According to interviews conducted for the study, the age range of workers is typically between 18 and 23 years old, although this can vary depending on the region. For example, in the south of the country, some workers are 40 years old or older. In terms of education, many are overqualified. For instance, according to a global report by the ILO, around 2% of delivery workers in Morocco only have primary education, around 13% have lower-secondary education, around 53% have higher-secondary education, and around 32% hold a Bachelor's degree.[38]

For both types of on-location platform work, around 2% of workers are migrants, according to the study by the ILO.[39]

Working conditions

It is estimated that Moroccan ride-hailing drivers and delivery riders earn around 26% more than their counterparts in the traditional taxi and delivery sectors.[40] According to available data on pay, the usual rate of pay for platform couriers is MAD 17 (around EUR 1.5) per delivery.[41] Based on the ILO survey, the average pay for delivery couriers was USD 1.6 per hour. Meanwhile, Moroccan ride-haling drivers earn slightly more than traditional taxi drivers (around USD 2.9 per hour, compared with USD 1.9 per hour for traditional taxis).[42]

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[36] International Labour Organization (2021). World Employment and Social Outlook 2021: The role of digital labour platforms in transforming the world of work,. pp. 138, 142, 144, https://www.ilo.org/wcmsp5/groups/public/---dgreports/---dcomm/---publ/documents/publication/wcms_771749.pdf

[37] International Labour Organization (2021). World Employment and Social Outlook 2021: The role of digital labour platforms in transforming the world of work, pp. 138, 142, 144, https://www.ilo.org/wcmsp5/groups/public/---dgreports/---dcomm/---publ/documents/publication/wcms_771749.pdf

[38] International Labour Organization (2021). World Employment and Social Outlook 2021: The role of digital labour platforms in transforming the world of work, pp. 138, 142, 144, https://www.ilo.org/wcmsp5/groups/public/---dgreports/---dcomm/---publ/documents/publication/wcms_771749.pdf

[39] International Labour Organization (2021). World Employment and Social Outlook 2021: The role of digital labour platforms in transforming the world of work, pp. 139, 142, 144, https://www.ilo.org/wcmsp5/groups/public/---dgreports/---dcomm/---publ/documents/publication/wcms_771749.pdf

[40] International Labour Organization (2021). World Employment and Social Outlook 2021: The role of digital labour platforms in transforming the world of work, p. 163, https://www.ilo.org/wcmsp5/groups/public/---dgreports/---dcomm/---publ/documents/publication/wcms_771749.pdf

[41] Industries.ma (2023, February). Glovo Delivered 2022: Glovo dévoile sa rétrospective 2022 et les habitudes des consommateurs marocains. https://industries.ma/en/glovo-delivered-2022-glovo-devoile-sa-retrospective-2022-et-les-habitudes-des-consommateurs-marocains/

[42] International Labour Organization (2021). World Employment and Social Outlook 2021: The role of digital labour platforms in transforming the world of work, p. 160, https://www.ilo.org/wcmsp5/groups/public/---dgreports/---dcomm/---publ/documents/publication/wcms_771749.pdf

The average weekly working hours of platform drivers and couriers are long, standing at 67 and 60 hours per week, respectively.[43]

Whereas delivery workers enjoy a certain legal status and their activities do not face any external challenge (one of these platforms even signed a deal with an insurance company with the aim of providing its couriers with health insurance), car owners who work for ride-hailing companies do not enjoy any recognition or legal protection, due lobbying by regular taxi businesses. Such drivers are regarded as practising a clandestine activity, and there have been many reports of these drivers being physically assaulted when caught in the act of dropping off or picking up a client. In the ILO survey, a particularly high share (38% of Moroccan workers reported facing discrimination or harassment.[44]

Survey data reveal general dissatisfaction among on-location platform workers, namely drivers and couriers, with their working conditions. According to a report by the ILO, only 20% of drivers are satisfied with their working conditions, while among delivery couriers the figure is 50%. More alarming metrics inform us that 34% of app-based taxi drivers reported having experienced a work-related injury or accident.[45] According to the same study, ride-hailing drivers in Morocco also express a particularly high level of dissatisfaction with their ride-hailing apps, compared with drivers from other countries.

In terms of career prospects, one interviewee working for a digital delivery platform, affirmed that working as a courier or driver is not intended to be full-time because these workers are mainly looking for a part time job. However, she added that in some cases, some of these companies use their workforce of couriers as a recruitment pipeline to hire them as employees (team leaders) who can in the future climb the company hierarchy.

With regard to contractual arrangements, delivery workers act as vendors using the one-person company legal status (auto-entrepreneur). Informality is not widespread among on-location platform workers. Every courier or driver has a contract as a vendor with the company, and therefore every transaction is traced, and work is monitored. One exception, however, is the ride-hailing application Indrive, which is characterised by informality, as it has no physical presence or legal representation in Morocco.

Despite not being considered employees of platform companies, couriers do benefit from some training, which aims to improve their skills. The main themes covered by such training are client service, security, stress management, and time management. Most of the time, training is given as a one-day session. According to a survey conducted by the ILO, 87% of Moroccan ride-hailing drivers and 90% of delivery riders have received training from platforms.[46]

[43] International Labour Organization (2021). World Employment and Social Outlook 2021: The role of digital labour platforms in transforming the world of work, p. 169, https://www.ilo.org/wcmsp5/groups/public/---dgreports/---dcomm/---publ/documents/publication/wcms_771749.pdf

[44] International Labour Organization (2021). World Employment and Social Outlook 2021: The role of digital labour platforms in transforming the world of work, p. 189, https://www.ilo.org/wcmsp5/groups/public/---dgreports/---dcomm/---publ/documents/publication/wcms_771749.pdf

[45] International Labour Organization (2021). World Employment and Social Outlook 2021: The role of digital labour platforms in transforming the world of work, p. 172, https://www.ilo.org/wcmsp5/groups/public/---dgreports/---dcomm/---publ/documents/publication/wcms_771749.pdf

[46] International Labour Organization (2021). World Employment and Social Outlook 2021: The role of digital labour platforms in transforming the world of work, p. 187, https://www.ilo.org/wcmsp5/groups/public/---dgreports/---dcomm/---publ/documents/publication/wcms_771749.pdf

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Current regulation, policies and strategic approaches

Labour market, employment and skills development

Morocco has elaborated its 'National employment strategy of the Kingdom of Morocco' (2015) in partnership with the ILO for the period 2015-2025. This strategy is based on four axes: 1) promoting the creation of jobs; 2) valorising human capital; 3) improving the efficiency of the existing employment programmes and boosting intermediation in the labour market; and 4) developing the labour governance framework. Some of its strategic objectives include the promotion of decent and productive jobs, reducing inequalities between men and women in work as well as training and education, reducing income inequalities, increasing social security coverage, and ensuring the representation of all categories of the labour force and enabling them to defend their interests.[47]

In November 2022, the Ministry of Skills, Economic Inclusion and Small Business organised a workshop in partnership with the ILO with the aim of reaching a consensus about the formulation of a New National Policy on Employment and Entrepreneurship with a horizon of the year 2035. This places a greater focus on labour market governance, encouraging job creation, equity in the labour market, and local and regional equity.

The Ministry has launched a number of initiatives with the aim of boosting employment among the country's youth. Three programmes are worthy of mention in this context:

- 'Idmaj', which resulted in the creation of more than 100,000 jobs during the years 2021 and 2022;

- 'Tahfiz', which targeted companies, making it possible for 3,472 beneficiary companies to hire more than 16,000 people during 2021 and 2022; And

- 'Taehil', which centred on training and skills, benefitting 6,462 young job seekers.[48]

In recent years, a programme entitled Moroccan Freelancers was initiated by the Ministry of Industry and Trade and the Green and Digital Economy. This aims to train 200,000 young people over four years to become autonomous entrepreneurs.

At the level of skills development, aside from existing university programmes in IT, digitalisation and artificial intelligence, the Office for Skills Training and the Promotion of Work (OFPPT) – the biggest public operator in vocational education and training – has launched a number of degree programmes in digitalisation at many of the centres it controls.[49] One innovative programme in the sector of digitalisation is the concept of 'Youcode Schools', which were founded and funded by the Moroccan Phosphate Company OCP. So far, three centres have been created in three cities, which offer free-of-charge coding courses to young people: a two-year programme entitled 'Youcode', and an eight-month course entitled 'Data Developers'.[50]

Decision makers in Morocco understand that online work represents a credible solution to unemployment among young people, whether NEETs or unemployed graduates. So far, however, their initiatives have not focused on a specific gender. The Ministry of Skills and Economic Inclusion has been very responsive to the new trend and the opportunities it presents. Its actions, however, have been oriented more towards training a labour force that can work and innovate, from an entrepreneurial

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[47] La Stratégie Nationale pour l'Emploi du Royaume du Maroc. https://www.ilo.org/wcmsp5/groups/public/---ed_emp/---ed_emp_msu/documents/project/wcms_420201.pdf

[48] Aujourd'hui Le MAROC, Employment: the first details of the New National Policy (2023, March), Emploi : les premiers détails de la Nouvelle Politique Nationale – Aujourd'hui le Maroc (aujourdhui.ma).

[49] Tobi, Y. (2023). E-Commerce and the Digital Economy in Morocco, A factor of Social Inclusivity and Employment: Approach and Limits, https://www.euromesco.net/wp-content/uploads/2023/02/EuroMeSCo-Paper-58.pdf

[50] https://youcode.ma/data

standpoint, in the digital sectors. Aside from tax reforms, no existing legislation or strategic document aims to frame or integrate the on-location platform sector within a larger vision for skills and employment.

Digitalisation

In 2020, the Office of the Head of the Government in Morocco published a general orientation document.[51] The digital policy outlined in this paper revolves around three orientations: 1) public administration at the service of citizens and enterprises; 2) a competitive economy, thanks to the performance that is driven by the use of digitalisation and the development of technology sectors; and 3) the creation of an inclusive society that uses digitalisation to improve its citizens' quality of life. The policy paper promises to boost the employability of young people by setting an objective of training 500,000 youth in digital skills. This orientation paper counts on digitalisation to ease access to social security and financial inclusion for vulnerable populations.

At the level of governance, it is worth mentioning that in 2017, Morocco established the Agency for the Development of Digitalisation, which now works under the authority of the Ministry of Digital Transformation and Administration Reform. Research into this subject has not yet yielded any independent study that can be used to evaluate the impacts of these measures.

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[51] General Guidance Note on Digitalisation in Morocco by 2025. Le Chef du Gouvernement. Notes d'Orientations Générale pour le Développement du Digital au Maroc à l'Horizon 2025 (2020, March). Avril_NOG_ADD_fr_SITE_VF.pdf

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Policy implications

Challenges and opportunities of the current situation

The sector of on-location platform work in Morocco promises real opportunities for entrepreneurship and innovation by emulating the business models of international companies. Two Moroccan start-ups, Kaalix and LAD, which have adopted the business model used by Glovo, Jumia Food, and Careem, stand out as examples of what businesses could stem from such a dynamic. A report by the ILO[52] also illustrates the opportunities offered by this new form of work, including for migrants, the low-skilled, the underemployed or unemployed.

The threats related to on-location platform work are mostly institutional in nature. In many respects, policy makers have tended to be very cautious and hesitant when it comes to providing regulations to accompany waves of change in modes of work. For example, public authorities in Morocco have not prohibited the downloading or the use of ride-hailing applications either by customers or drivers, but at the same time, when an on-location platform driver is physically assaulted by an 'official' taxi driver, the reaction of the authorities is to say that they have never issued a licence for the on-location platform worker to practice the activity of urban and inter-urban transport. Many videos have been posted in social media that document chaotic scenes of drivers working for ride-hailing companies being harassed and even physically assaulted by 'regular' taxi drivers.[53]

Meanwhile, the opportunities brought by online work are huge in terms of job creation in small and remote cities in which there is little economic activity. Some of these cities host universities and vocational centres, which can train people or retrain unemployed graduates towards digital skills. The business model of outsourcing services to national and international companies can create jobs anywhere, because all that is required is internet infrastructure and a skilled workforce. New in-demand services have emerged that can attract institutional customers, such as automation via AI, chat management, business research, data processing, and business translation. The CEO of the company Outsourcia, states that his company can create a large number of jobs if they find candidates with the right technical and soft skills.[54]

However, it seems that freelancers are mostly used to thriving in a context in which rates of informality are particularly high. The recent changes in financial law and the tracking of online workers by tax authorities (see more information below) has shaken the freelancer community. Many have turned to social media to express their discontent at what they call a 'crackdown' on their activities. Another challenge is that the trend of online working does not offer a solution to brain drain, but in many cases favours it; some online workers have started working online for a company based in Europe, and have ended up being offered a job in that country.

Gaps in the existing strategic and policy approaches

The thriving of online work and the use of the one-person company legal status, prompted a response from public authorities at the urging of the Moroccan employers' confederation (CGEM). The financial law of 2023 contained a new provision that deprives one-person companies from being able to enjoy the usual 1% tax scheme if transactions with the same customer exceed MAD 8,000 (approximately EUR 750). In such case, these businesses become subject to 30% tax on revenue, like a traditional

[52] International Labour Organization (2021). World Employment and Social Outlook 2021: The role of digital labour platforms in transforming the world of work, https://www.ilo.org/wcmsp5/groups/public/---dgreports/---dcomm/---publ/documents/publication/wcms_771749.pdf
[53] The following video shows the testimonials of application drivers who claim to have been severely beaten by regular taxi drivers: https://www.youtube.com/watch?v=AUiHPi0PVmA
[54] La Vie éco (2022). La révolution des Services Externalisés, available at : Dossiers Spéciaux - La Vie éco (lavieeco.com)

company. This decision has been met with great disappointment on the part of both online freelance and on-location platform workers.

According to one interviewee, 'The law on the taxation of self-entrepreneur status has been harmful to the sector as it has encouraged employees to leave the business, to increase their income and to reduce their taxation, leaving the business with a minimal margin and a high taxation." Various justifications can be found for this decision, one of which is that it protects against a kind of 'revolving door' through which an employee leaves a company and comes back as a freelancer, at a lower human resources cost. However, the use of taxation as a tool to remedy this situation can only push workers into informality or even result in brain drain. We were not able to find any other provisions that aim to regulate or create a legal framework that enables online workers both to view their choice of career path as sustainable, and to adequately fulfil their duties as taxpayers.

Implications/possible measures for regulation

- Many rural areas in Morocco lack reliable access to high-speed internet services. Efforts should be made to eliminate this issue, which hinders development in rural areas and limits the growth of local businesses.

- With the authorities aware of the possibility of solving the problem of youth unemployment by fostering online platform work, greater attention should be directed by them towards gender-specific and the marginalised segments of the population (rural residents, disabled people, etc).

- Online and on-location platform work could potentially help to strengthen women's activity in the labour market by offering them flexible work that can be adjusted in line with their home responsibilities. To achieve this, the Moroccan government should put efforts into promoting new forms of work among women, and equipping them with adequate skills needed for these jobs.

- New forms of work offer great potential that can be used by policy makers to alleviate migration processes, brain drain, and outflow of young people from the country. Such forms of work can also be treated as a great opportunity when it comes to the most vulnerable, particularly refugees. To fulfil this potential, various promotion and upskilling programmes need to be facilitated.

- An institutional response is needed to reform labour laws in such a way that online and on-location platform workers can gain access to full labour rights such as insurance, social security and a retirement scheme. The current state of affairs is precarious, with no opportunity for career progress or visible evolution of the sector.

- There is a need for labour and other regulations that would extend beyond the status of self-entrepreneur, which was promoted to encourage individuals (such as artisans, plumbers, etc.) to enter the formal sector.

- There is a need to develop, with the active participation of all stakeholders, a policy document or other regulations that captures and integrates the local online platform sector within a broader vision of jobs and skills.

- The laws and solutions introduced in the field of online platform work should be balanced so that they benefit the self-employed but do not negatively affect companies. Laws should allow the digital and traditional economies to mutually complement each other.

- While the programmes launched by some ministries and agencies to train young people in digital skills are ambitious, further training should be provided for youth in digital skills, taking into account those occupations and qualifications that are currently in demand.

- It is necessary to foster the creation of income-generating activities for those who wish to work as freelancers, and a public-private partnership in this regard would be a viable way towards consolidating existing achievements and exploring untapped potential.

Summary

Although Morocco is considered one of the most competitive economies in Africa, the country's economic growth has not been sufficiently labour-intensive enough to absorb its growing working-age population. The country is characterised by a large informal sector, high rates of economic inactivity, low levels of female participation in the labour force, the prevalence of low value-added services, and a difficult business environment, especially for start-ups and young firms.

Online work on and off digital platforms has gained popularity in the country. These types of work constitute a labour market that is both dynamic and versatile. They have opened unexpected opportunities for employment in almost all fields. Engagement in online work in Morocco has shown a consistent upward trend between 2017 and 2023, and hinges on two key factors: the potential for higher earnings, and the autonomy it grants, which is particularly beneficial for caregivers and those in challenging urban environments. Conversely, challenges include an uncertain flow of work, intense competition (especially from lower-priced global counterparts), self-management complexities, and potential distractions due to the freedom afforded by remote working.

The winners in this situation appear to be IT professionals, who have discovered that there are no borders barring them from selling their services as freelancers. The biggest share of services sold by Moroccan online freelancers are to the IT sector, and include web/database development and management, programming and applications development, graphic design and content creation.

Many workers engage in online work as a second job to generate additional income, but online work on and off digital platforms can in many cases also lead to full-time employment, such as working for the types of service providers that used to be called 'call centres', or other digitally oriented companies. In such case, this is mostly a long-term activity. In general, the trend towards engaging in online work as a career path and a full-time job is a global one that is likely to accelerate.

Informality is common among online digital platform workers; however, many types of contractual relationship are available to the workers, the most traditional being is the services provision contract ('Contrat de prestations de services'), which existed prior to the emergence of these types of work. Some providers have chosen to set themselves up as a company (self-employed legal status) in order to issue invoices and work in a more predictable local market. In doing so, however, they face challenges such as managing their own accounting records and tax obligations, and observing a legal limit on annual turnover which, if exceeded, necessitates transitioning to the status of a conventional company, in compliance with a 2023 finance law.

The majority of online platform workers in Morocco are men, who are around six times more likely than women to work on online labour platforms. The educational level of online workers varies from graduates of vocational education to engineering graduates and PhD holders, depending on the types of service or the complexity of the assignments in question. Average hourly earnings for online platform workers in Morocco vary between professions, with the highest rates being paid for professional services and software development. Meanwhile, gender differences persist, with men requesting higher rates than women. Despite these disparities, platform earnings significantly exceed local hourly wages, underlining the potential of online work as a substantial income source for workers in Morocco, although variations in requested rates must be taken into account.

In the field of on-location platform work, a dynamic market exists that is dominated by the multinational delivery applications Careem, Glovo and Jumia Food. These companies only operate in big cities, which is why it cannot be assumed that this type of work is widespread across the country. Society has responded very positively to this new trend, and appreciates its value.

Even though ride-hailing applications have operated in Morocco since 2014, and delivery companies been operating for longer than that, it is striking to note that these categories of workers have not made it on to the agenda of policy makers. The *status quo* for ride-hailing workers remains stuck between the 'rock' of transportation law and the 'hard place' of threats from regular taxi drivers. Meanwhile, delivery couriers appear to be left alone in their one-person company status.

The typical worker engaging in on-location platform work in Morocco is male, with at least higher-secondary education. The figure of 80% of on-location platform workers who hold a graduate degree says a lot about their motivation to pursue such work, which is above all based on avoiding unemployment. Meanwhile, both drivers and couriers express general dissatisfaction with their working conditions.

Informality is not widespread among on-location platform workers, as every courier or driver on most platforms has a contract as a vendor with the company. Meanwhile, on-location digital platforms are unlikely to change their working relationship, shifting from the current vendor-client dynamic which uses the status of self-entrepreneur, to that of a contract according under labour law (limited or unlimited working contract), which would allow workers to benefit from rights such as paid holidays, private insurance, and so on.

It is worth mentioning that, despite not being considered employees of the company, couriers do benefit from some (usually one-day) training that aims to improve their skills (mainly client service, security, stress management, and time management).

Overall, it is difficult to conclude that on-location platform work might be a path towards a stable and prosperous career. It is more likely to be an activity aimed at making extra income, or a transitional job on the way to a more traditional career as an employer or entrepreneur.

With regard to strategic documents on the labour market, Morocco has devised its 'National Employment Strategy' for 2015-2025, in collaboration with the ILO. More recent developments include a collaboration between the Ministry of Skills, Economic Inclusion and Small Business and the ILO to host a workshop in November 2022 aimed at building consensus towards the creation of the New National Policy on Employment and Entrepreneurship by 2035, prioritising labour market governance, pro-job budgeting, labour market equity, and regional inclusivity. In addition, several youth-focused initiatives have recently been undertaken to increase employment, including the 'Idmaj' programme, which generated over 100,000 jobs in the years 2021-2022. In addition to existing university programmes in IT, digitalisation and AI, the Office for Skills Training and the Promotion of Work (OFPPT) has introduced various degree programmes in digitalisation, including the innovative 'Youcode Schools' funded by the Moroccan Phosphate Company OCP, which provide free coding courses.

In relation to the sphere of digitalisation and its governance, in 2017 Morocco established the Agency for the Development of Digitalisation under the Ministry of Digital Transformation and Administration Reform. Furthermore, in 2020 the Office of the Head of the Government released a digital policy framework emphasising three core directions: enhancing public services, fostering a tech-driven economy, and promoting social inclusivity through digitalisation, with a pledge to train 500,000 youths in digital skills. While it lacks an independent evaluation, a report initiated by Chinese IT corporation Huawei suggests that despite the efforts listed above, youth in Morocco continue to seek opportunities abroad due to challenges in retaining experienced IT professionals, with 70% of local companies struggling to hire middle-management IT personnel, who are drawn to online assignments from both local and foreign firms.

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List of interviewees

Name	Organisation	Title	Date of interview
Tarik Fadli	La Marocaine des e-Services	President, Board Member, International Summit for Smart Cities in North Africa	21 April 2023
Nasser Kettani	Hidden Clouders & APEBI.	Managing Partner, Board Member	19 April 2023
Mourad Haloui	Independent	Digital Consultant	18 April 2023
JIhad Zouhair	Independent	Senior consultant SAP/PP/QM	17 April 2023
Omayma Ait Ali Wakrim	Glovo	P&B Trainer	09 April 2023