

KEY POLICY DEVELOPMENTS IN EDUCATION, TRAINING AND EMPLOYMENT

MOROCCO

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EXECUTIVE SUMMARY

With its strategic geographical position and solid infrastructure, Morocco aims to position itself as an economic bridge between Europe and Africa. The country has strengthened its relations with its neighbours to the south and its European partners, while consolidating its progress with regard to foreign policy.

Demographically, Morocco had 36.7 million inhabitants in 2022, with an increasingly urban and ageing population. The country faces challenges related to emigration and brain drain. Economically, Morocco experienced significant growth despite difficult conditions in 2023, with a 3.4% increase in GDP. The agriculture, industry and tourism sectors have shown remarkable resilience (World Bank, 2024).

On the social front, Morocco has made significant progress in the fight against illiteracy, although challenges remain, particularly in the area of adult female literacy. The country has improved its ranking in the Human Development Index thanks to an increase in life expectancy and length of schooling.

In terms of education, the Ministry of National Education, Pre-school and Sports has launched an ambitious reform agenda to improve the overall performance of the sector, in line with the education sector vision for 2015-2030 which lays the foundations for a 'new Moroccan education system'.

In the field of higher education, 2022 also saw the launch of the 'Plan for accelerating the transformation of the higher education, scientific research and innovation ecosystem (ESRI Pact 2030)'.

At the vocational training level, various initiatives have been put in place through the development of vocational training provision, with the opening of new pathways and planning studies to respond effectively to the needs of a skilled workforce. A strategic review is currently underway to set up an observatory to match the needs of the labour market with the vocational training on offer within the Department of Vocational Training (DFP). At the moment, the training offer is diverse and covers various economic sectors. The occupational integration rate is encouraging with 69.8% of graduates from the class of 2019 entering the labour market within nine months of obtaining their degree (DFP, 2023).

In order to improve the employability of young people through tailored training courses that meet the needs of economic sectors, in 2019, the government launched a new programme with the development of *Cités des Métiers et des Compétences* (CMCs) which are decentralised and are found in each of the 12 regions. These *Cités des Métiers et des Compétences* are a new generation of vocational training centres established by the *Office de la Formation Professionnelle et de la Promotion du Travail* (OFPPT – Office of Vocational Training and Work Promotion). These centres are run in partnership with local businesses and local or regional public bodies.

In recent years, a considerable number of initiatives have been launched in response to major challenges: persistent unemployment, a mismatch between skills and market requirements, and low participation of young people and women in the Moroccan labour market. The state has established active labour market policies (ALMPs) through the National Agency for the Promotion of Employment and Skills (ANAPEC – *Agence Nationale pour la Promotion de l'Emploi et des Compétences*). The national employment strategy (NES) 2015-2025 aims to create 200 000 jobs per year by 2025, with initiatives to improve employability and support entrepreneurship. According to the NES mid-term evaluation report, the various initiatives have not succeeded in changing the dynamics of the labour market and have not therefore created the estimated number of new jobs.

1. MAIN POLITICAL, DEMOGRAPHIC, ECONOMIC AND SOCIAL CHARACTERISTICS

Political developments

With its favourable geographical location and relatively solid infrastructures, Morocco intends to position itself strategically as an economic and financial bridge between Europe and Africa. To this end, Morocco has launched a South-South strategic partnership based on co-development and closer cooperation with most of its southern and regional neighbours, in order to make the best use of its geographical location and historical relations with its European and Mediterranean trading partners. These include peer-to-peer exchanges and the sharing of expertise to address skills development and climate action (Hekking, 2020).

Morocco is a constitutional monarchy with a king who has significant executive, legislative and judicial powers. King Mohammed VI, on the throne since 1999, has considerable influence on the political and economic affairs of the country. The 2011 Constitution introduced some democratic reforms, restricting the powers of the King slightly, particularly in relation to government governance. However, the sovereign remains the key player in terms of power, especially in the areas of foreign policy and security issues.

The Moroccan government is led by a prime minister, currently Aziz Akhannouch, who was appointed after the 2021 parliamentary elections. Billionaire businessman Akhannouch is the leader of the *Rassemblement National des Indépendants* (RNI), a party which forms part of the government coalition with other parties, such as *Istiqlal* (PI) and the *Mouvement Populaire* (MP). The current coalition's priority is to relaunch the Moroccan economy following the effects of the COVID-19 pandemic and global economic challenges.

In recent years, Morocco has made considerable efforts to consolidate the progress made in its foreign policy. The country has joined 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'. Morocco was the first country in the region to obtain advanced status in 2008, making it a pioneer in the European Neighbourhood Policy.

Western Sahara continues to be a major source of tension for Morocco which considers Western Sahara as an integral part of its territory, while the Polisario Front, supported by Algeria, fights for the independence of the region. The question of Western Sahara is one of the most complex and sensitive diplomatic issues in international politics at the moment.

Demographics

According to High Commission for Planning (HCP) data, the population of Morocco was estimated to have reached 36.7 million in 2022 (37.8 million in 2023, according to World Bank data), 64% of which live in urban areas, concentrated mainly on the Casablanca-Tangier axis. The population is seeing a higher proportion of females to males, with females accounting for 50.2% of the population.

Morocco's population growth is expected to continue for more than a decade (CERED, 2017). Age distribution is also changing, with the pre-school and school-age populations tending to decrease and the active population expected to increase until 2050. In short, the demographic trend in Morocco, similar to that observed with its regional neighbours and following the 'rapid increase in youth population' in the 2000s, is that of an increasingly urban and ageing population, which is likely to shift the current pressure on the school system to the labour market and social security systems (Engelhardt-Wölfli et al., 2018). The latter will be particularly affected by the increase in the senior cohort (aged 60 and over), which is expected to double over the next 30 years, reaching 23.2% of the total population in 2050, compared with only 9.4% in 2014. The current proportion of young Moroccans (aged 15 to 24) in the population is 25%, which corresponds to the average for the SEMED region (southern and eastern Mediterranean region) (ETF, 2021a).

Morocco has a long tradition of emigration, with 8.6% of its nationals living abroad (ETF, 2021a). While Moroccan migrants have historically had low to medium skill levels, more than a third held a higher education qualification in 2019 (HCP, 2021b). As a result, the risk of brain drain is now receiving increasing attention in human capital development policies. Men looking for work abroad form the largest contingent of the many migrants leaving the country. Women tend rather to leave the countryside and settle in urban areas, usually following the departure of their husband. The annual number of migrant workers has continued to grow, increasing from 53 000 in 2000 to 98 600 in 2019 (UN-DESA, 2019). Most migrant workers go to the EU (70.7% to France and 24.4% to Spain), but some emigrate to the United Arab Emirates (3% – MTIP, 2017). The main motivation for migrants is work, which accounted for 47.4% of departures in 2019 (ETF, 2021a).

Main economic developments

Morocco's economy has developed strongly over the last 30 years and today enjoys the most stable investment climate and the most diversified economy in the region. In a report on where to invest in Africa in 2024, Morocco was one of the top five investment destinations in Africa. The country is well positioned in terms of connectivity, innovation and economic stability. Moreover, its strategic proximity to European markets makes it even more attractive (Rand Merchant Bank, 2024).

According to World Bank economic monitoring, economic growth recovered significantly in 2023. 2023 was marked by difficult conditions, such as a widespread global economic downturn, an inflationary shock, below-average levels of rainfall and a devastating earthquake in the Al Haouz region. However, the resilience of the Moroccan economy has maintained GDP growth, which went from 1.5% in 2022 to 3.4% in 2023. Some indicators suggest that this positive dynamic continued in early 2024 (World Bank, 2024). All this demonstrates that Morocco has the capacity to respond effectively to shocks, as also shown by the way the country recovered from the COVID-19 pandemic of 2020 and the 2023 earthquake.

According to the same World Bank report, agricultural value added increased by 1.4% in 2023, despite difficult climatic conditions, as production partially recovered after the severe drought in 2022. Non-agricultural growth is expected to strengthen in 2024, supported by a robust industrial sector, which slightly compensates for the slowdown in the services sector. Automotive and aeronautical exports, as well as the phosphate and fertiliser sectors and construction industry, increased significantly in 2024. Tourism remains an important sector in the Moroccan economy, representing a significant source of income, employment and foreign exchange for the country. According to the latest tourism satellite account published by the HCP, the sector contributes around 7% of Moroccan GDP. Its actual economic impact could be even greater due to its multiplier effects in various other sectors. Tourism provides more than half a million direct jobs, that is, around 5% of the active population, and has seen a marked recovery since the COVID-19 crisis. Tourism reached a new record in 2023 with 14.5 million foreign tourists and revenue of MAD 104.7 billion (World Bank, 2024).

Foreign direct investment (FDI) remains significant and is increasingly geared towards the manufacturing sector. The creation of modern industrial niches, well connected to global value chains, has enabled the country to maintain its access to international capital markets (World Bank, 2023). FDI has expanded significantly with the arrival of China as an investor in Morocco. New greenfield¹ FDI projects announced by international companies have more than quadrupled, from USD 3.8 billion in 2021 to USD 15.6 billion in 2022 and USD 20.4 billion in 2023. China has become the new lead investor, accounting for 29% of all greenfield FDI investment expenditure announced for 2022-2023. European countries and the United Arab Emirates accounted for 53% and 6% respectively, and the United States only 1%. We are also seeing the emergence of new technologies and new sectors. Renewable energy is increasingly important due to the promotion of new large-scale green hydrogen projects. At the same time, electronic manufacturing has become the second target sector, driven by the production of battery components for electric vehicles (World Bank, 2024).

¹ A greenfield investment is a form of direct investment abroad in which the company builds new facilities in the third country. The facilities created can be production plants as well as offices, points of sale or logistics centres. It usually involves creating a new subsidiary in order to break into a foreign market.

Small and medium-sized enterprises (SMEs) account for 99.7% of the Moroccan business fabric, create 37.8% of value added and represent 73.7% of registered employment. According to the latest annual report from the Moroccan Observatory for Micro-, Small and Medium-Sized Enterprises (OMTPME – *Observatoire Marocain de la Très Petite, Petite et Moyenne Entreprise*), as in previous years, the business fabric remains largely dominated by micro-enterprises, although their share has fallen in recent years to 88% in 2021. Some 87.1% of businesses employed fewer than 10 people, with only 1.6% employing more than 100 people (OMTPME, 2021).

The reforms identified in the SME Policy Index (OECD/EU/ETF, 2018) suggest that the Moroccan model could inspire other economies in the region to improve their SME policies. Since 2002, Morocco has had a specific law on SMEs (the Charter for Small and Medium-Sized Enterprises) with the creation of the National Agency for the Promotion of Small and Medium-Sized Enterprises (ANPME – *Agence Nationale pour la Promotion de la Petite et Moyenne Entreprise*). Several business support programmes exist in order to develop entrepreneurial initiative and support micro-, small and medium-sized enterprises in their economic growth, including public-private partnerships.

According to the 2020 enterprise survey, small, medium-sized and large enterprises identified the following three main obstacles to doing business: corruption, tax rates and tax administration (World Bank, 2020). Continued investment to optimise the business environment remains a priority for the government, to enable businesses to grow and remain competitive.

The informal economy still accounts for a significant proportion of jobs and production, and generates both traditional and new forms of work. Despite forecasts to the contrary, traditional ways of informal paid work (such as casual employment) and self-employment (such as small-scale street trading) persist. According to an ILO publication (the only source of statistics on the informal economy in Morocco), based on data from the National Social Security Fund, jobs linked to informal production units account for 83% of informal jobs, and for the rest, only 17% on average are salaried workers (ILO, 2018b).

Main social issues

Morocco has put a lot of effort into the fight against illiteracy. The National Agency to Combat Illiteracy (ANLCA – *Agence nationale de lutte contre l'analphabétisme*) has adopted a roadmap for the period 2023-2029 aimed at reducing illiteracy by 10% by 2029.

Efforts to get children into full-time education are reflected in youth literacy rates. According to the HCP (2021 figures), 96.6% of young men and 92.8% of young women can read and write. The situation is more worrying for adults, especially women, with a female adult literacy rate of 56.1%. As a result, the majority of those taking part in literacy programmes are women from rural areas (HCP, 2023b).

The quality of education remains a major challenge: according to data published 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 progress mentioned above, the average stands at 64.9% (World Bank, 2022).

Morocco has advanced in the Human Development Index (HDI) world ranking and was placed 120th out of 193 countries in the world in 2022. The higher HDI position is due to life expectancy and the expected length of schooling, which increased by 1.4% and 4.3% respectively.

Monetary poverty at national level decreased significantly from 14.2% in 2004 to 4.8% in 2014 and to 1.7% in 2020. As a result of the disastrous effects of the earthquake in September 2023, poverty levels in the six provinces affected have increased, with considerable differences from one province to another. Looking at the whole area affected by the earthquake, the average poverty rate has reached 18.5%, which is significantly higher than the national rate. Similarly, the average vulnerability rate in the disaster zone is 21.5%, which is also higher than the national rate of 12.6% (HCP, 2023a).

People with disabilities, who represent 6.8% of the Moroccan population (i.e. 2.3 million people), are among the most vulnerable groups in the country (MSFFDS, 2014), and are particularly affected in

times of crisis. It is estimated that two thirds of these people have no access to any social protection and that, of those who do receive it, the large majority is covered by RAMED (the Moroccan medical assistance scheme for the most vulnerable families) (MEFRA, 2020).

2. EDUCATION AND TRAINING

2.1 Trends and challenges

Educational strategy and legal framework for education

The latest measures to emerge from overall national strategy, the highly ambitious new development model (NDM) complements the previous collection of national strategies and policies. It aims to lift Morocco into the top third of the various international rankings by 2035, further strengthening the country's aspiration to become a regional model. The objectives of the new model include doubling GDP per capita by 2035, ensuring that more than 90% of pupils master basic skills and competencies by the time they leave primary school, doubling the proportion of formal jobs out of the total number of jobs, increasing the participation rate of women from 22% in 2019 to 45% in 2035, and even achieving a citizen satisfaction rate of more than 80% with regard to administration and public services.

Government policy comes under the scope of the Strategic Vision for Reform 2015-2030, which focuses on four key objectives: equity and equal opportunities, quality for all, promotion of the individual and society, and efficient change leadership.

In terms of performance review, the Strategic Vision for Reform 2015-2030 has led to the development of a national evaluation framework which will be used regularly to record progress made against the reform objectives. This system is now supplemented by evaluations at regional level (CSEFRS, 2021a). To this end, the High Council for Education, Training and Scientific Research (CSEFRS – *Conseil Supérieur de l'Éducation, de la Formation et de la Recherche Scientifique*), which is responsible for monitoring reform, has established a 'regional index for the development of education'. This composite index brings together 157 indicators divided into three main elements corresponding to the objectives of the reform, namely equity, quality and promotion.

The main lines of the Strategic Vision for Reform 2015-2030 have been converted into a framework law on the education, training and scientific research system (Framework Law No 51-17) adopted in 2019. This law, which guarantees the integrity of the strategic vision in the face of political and institutional risks, constitutes a binding national understanding for all parties, and provides a legal basis for further development and implementation.

In addition, the Ministry of National Education, Pre-school and Sports has launched an ambitious reform agenda to improve the overall performance of the sector, in line with the education sector vision for 2015-2030 which lays the foundations for a 'new Moroccan education system'. The objectives of the 2015-2030 education sector reform are to achieve more equitable access to education throughout Morocco, with a focus on the inclusion of girls and equal opportunities to raise education levels in the country.

The corresponding roadmap for 2022-2026 covers three areas of interest and lists 12 specific commitments. It aims to improve governance, strengthen the level of engagement of various stakeholders in the reform process and rethink financing of the sector.

As part of the 2022-2026 roadmap, the 'Pioneer Schools' project was launched during the 2023-2024 school year. This project aims to lay the foundations for state education in the future, based on a participatory approach meeting the expectations of pupils, their parents and teachers, and pursuing the same principles.

In the field of higher education, 2022 also saw the launch of the 'Plan for accelerating the transformation of the higher education, scientific research and innovation ecosystem (ESRI Pact 2030)'.

Expenditure on education

Expenditure on education as a percentage of GDP increased steadily between 2015 and 2020, from 5.1% to 6.3%. By contrast, in 2021, expenditure on education as a percentage of GDP fell to 5.6% and again saw a slight recovery of 0.2% in 2022.

The same trend can be observed in public spending on education, where there was a fall in 2021 (from 24.2% in 2020 to 23.8% in 2021) and a small recovery in 2022, where 23.9% of public expenditure was spent on education.

Access, participation and early school leaving

Since 2018, Morocco has been rolling out a large-scale programme to expand 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 this period, 13 594 new pre-school classes were created throughout the country (UNESCO, 2022).

Net enrolment rates in secondary education have continued to increase since 2019, with rates of 89.2% in 2019 and 97.6% in 2023 for ISCED level 2. As for ISCED level 3, the enrolment rate increased from 71.5% in 2019 to 78.9% in 2023.

According to figures from the Ministry of Higher Education, Scientific Research and Innovation, the university system has seen an upward trend in the number of students enrolled over a short period; for example, the number of new students in the first year (first year after the *baccalauréat*) increased from 213 449 in 2015-16 to 297 887 in 2023-24, with an average annual growth rate of 4.3% (ENSUP, 2023).

The phenomenon of early school leaving remains a problem in Morocco, but an improvement can be seen. According to education statistics from the Ministry of National Education, Pre-school and Sports, the school drop-out rate fell by 12%, from 334 664 in the 2021-2022 school year to 294 458 in the 2022-2023 school year, 45.5% of which were in rural areas. Most pupils dropping out of school are over 16 years old. The average drop-out rate fell from 5% in 2021-2022 to 4.4% in 2022-2023. A series of measures to combat early school leaving are being put in place by the ministry, including the promotion of the school and careers guidance system, catch-up through second-chance schools, and the strengthening of social assistance benefits, such as conditional family allowances, school transport and boarding schools.

PISA results

The PISA survey provides an insight into how education systems prepare pupils for real-life challenges and future success. The results of the 2018 PISA survey conducted in Morocco show that in reading, 15-year-olds in Morocco scored 359 points, compared with an average of 487 points in OECD countries. On average, 15-year-olds scored 368 points in mathematics, compared with 489 points in OECD countries. The average results in science were 377 points, compared with an average of 489 points in OECD countries. The average difference between advantaged and disadvantaged students in reading is 51 points, compared with an average of 89 points in OECD countries. However, 13% of disadvantaged students are academically resilient, whereas the OECD average is 11% (OECD, 2018).

Morocco took part in the 2022 PISA survey and the country's results were published on 5 December 2023. In mathematics, the results were quite similar to those from 2018, while in reading and science, they were lower than in 2018. There is a positive trend in access to secondary education for previously marginalised populations. This suggests that the enrolment rate in secondary education has increased and could explain the figures showing declining performance in reading and science, due to the integration of 15-year-olds from marginalised populations, whereas the results observed for the most advantaged pupils have remained stable.

In 2022, girls outperformed boys by 4 points in mathematics and by 22 points in reading. The proportion of low achievers is similar for boys (81%) and girls (82%) in mathematics, but in reading, the proportion is higher for boys (78% of girls and 84% of boys scored below level 2 in reading).

Young people not in education, employment or training (NEETs)

In 2022, the results of the national employment survey showed that young NEETs aged between 15 and 24 accounted for 1.5 million young people in Morocco, that is, 25.2% (30.5% reside in rural areas and 21.6% in urban areas). We know that women account for almost 72.8% of NEETs (ONMT, 2023). We can also see that the NEET rate has not changed significantly in recent years.

Various analyses into the NEET issue demonstrate the low level of qualification and participation of young people and women in working life in rural areas, as well as vulnerability at work and the low quality of jobs held by these young rural people, especially women. The lack of job security for young people in rural areas is a form of labour market failure. Despite the efforts made in recent years, there is a need for targeted interventions to help young people in rural areas, particularly NEETs who have accumulated shortcomings in terms of education, training and soft skills, in order to improve their employability and facilitate their transition into working life. This should be done in a differentiated way to take account of the specific characteristics of rural areas, skills requirements at local level and profiling of the rural, unemployed youth population. Non-formal training as organised by businesses, civic organisations and cooperatives with links to local communities play an important role in providing training (PCNS, 2022).

2.2 Initial vocational education and training (IVET) and adult education

Strategic and legal framework for IVET and adult education

The 2021 national vocational training strategy concentrated all partners on a common, modern vision for skills development, focusing on employability, more efficient governance and use of resources. The vocational training strategy was supplemented by a roadmap for improving VET.

Following on from these reforms, Framework Law 51-17 on the education, training and scientific research system and the roadmap for the development of vocational training, adopted in 2019, have provided a broader and more innovative vision, ultimately helping to improve the quality of the qualification and skills development process, establish a flexible and responsive system, and open up the system to new sectors.

There are two types of training in Morocco:

- Initial training, which is aimed at young people who are at least 15 years of age and who meet the required conditions (school level and age) to access the vocational training system. This takes place at training centres and/or in companies, depending on the level and type of training.
- Continuing education (or workplace-based training), which is aimed at people who are in employment (usually salaried), during working hours, or people looking for work. It may be provided within the company itself or at training centres. It enables individuals to acquire skills that are useful to the company.

In addition to these two types of training, there is a short, recognised, vocational training programme intended for young people with difficulties getting into work, which aims to adapt their profile to the needs of the labour market and facilitate their integration into working life. Recognised vocational training is particularly useful in sectors such as the automotive industry, aeronautics, hospitality and tourism, transport logistics, buildings and public works, ICT, e-commerce, artificial intelligence, management, trade, textiles and clothing.

According to the 2023 activity report from the Department of Vocational Training (DFP), the challenges facing vocational training relate to 1) upgrading the needs of the economy in line with developments in new technologies and business structures, 2) the quality of teaching approaches, in particular the skills-based approach, the training of trainers, the governance of establishments and improvements in their internal and external performance, and 3) social and professional integration in order to promote the integration and re-integration of marginalised populations (DFP, 2023).

In order to respond to these challenges, various initiatives have been launched through the development of training provision, with the opening of new pathways and planning studies to provide an effective and up-to-date response to the needs of a skilled workforce. A strategic review is currently underway to set up an observatory to match the needs of the labour market with the vocational training on offer within the DFP.

This alignment of skills and the actual needs of the labour market requires better collaboration between companies and training centres. Public-private partnerships should be strengthened, for example, by extending the Institute of Delegated Management (IGD) model to other sectors with high value added.

In order to improve the employability of young people through tailored training courses that meet the needs of economic sectors, in 2019, the government launched a new programme with the development of *Cités des Métiers et des Compétences* (CMCs) which are decentralised and are found in each of the 12 regions. These *Cités des Métiers et des Compétences* are a new generation of vocational training centres established by the *Office de la Formation Professionnelle et de la Promotion du Travail* (OFPPT – Office of Vocational Training and Work Promotion). These centres are run in partnership with local businesses and local or regional public bodies. The CMCs offer modern teaching spaces equipped with innovation areas, such as fab labs, digital factories and co-working. At

the time of writing, seven CMCs have been created, four CMCs are under construction, and work should start soon on another centre.

VET governance and funding arrangements

For years, the governance and coordination of the vocational training system has also posed a challenge because of fragmentation.

Today, the Department of Vocational Training (DFP) within the Ministry for Economic Inclusion, Small Businesses, Employment and Skills (MIEPEEC) is responsible for the vocational training system.

The DFP has two roles:

- a strategic role in regulation, monitoring and guidance, ensuring consistency in the actions of the various stakeholders and the quality of players involved in vocational training;
- an operational role through structuring projects which provide an example for the entire vocational training system.

Morocco currently has over 2 000 vocational training institutions, with an uneven distribution between the public sector (with 666 institutions) and the private sector (with 1 372 institutions).

Training provision is diversified, with 412 pathways covering various economic sectors. In 2022, over 500 000 trainees were taken on, divided between the public and private sectors. The occupational integration rate is encouraging with 69.8% of completers in 2019 entering the labour market within nine months of finishing the course (DFP, 2023).

The distribution of funding sources for vocational training in Morocco is quite diverse:

- Vocational training tax: this tax is levied on companies; it is equivalent to 1.6% of the wage bill. It is the main source of funding, contributing up to 46% of vocational training income.
- General state budget: this source includes several components, such as contributions from training departments, ANAPEC (National Agency for the Promotion of Employment and Skills) and the DFP. This represents 27.2% of total funding.
- Funding by households: households contribute to the funding of vocational training provided by private institutions. Their share amounts to almost 23% of total funding, although these institutions represent 18% of the training offer in terms of numbers.
- International sponsors: bodies such as the European Union and German agency for international cooperation (GIZ) also contribute to the funding of vocational training in Morocco. Although it varies from year to year, their contribution is estimated to be around 5% of total revenue on average (DPF, 2023).

Morocco's overall financial input for vocational training, coming from all these sources, represents around 0.48% of GDP according to 2016 data, well below the target of 1%. This underlines the need for investment in skills and workforce development.

Qualifications, validation and accreditation of skills

Morocco's national qualifications framework (NQF) is comprehensive, covers all types of education and training qualifications, and comprises eight levels. It incorporates elements of a modern qualification system, including results-based approaches, while systematic quality assurance measures are in place. The Education Act 2019 refers to the NQF, which is also included in various pieces of legislation relating to education and training.

Although stakeholders, economic sectors and education and training providers are made aware of the NQF, the NQF is not yet fully operational. To achieve this, the NQF should register all qualifications under the responsibility of different institutions in a national qualifications database, which would link all qualifications and make them more accessible and understandable.

The NQF steering committee and NQF standing committee were given responsibility for the strategic orientation and coordination of NQF implementation, respectively. The day-to-day management, governance and coordination of the qualification system should also be strengthened. This is all the more important as responsibility for compulsory education, higher education, vocational training and adult learning is spread across different ministries. In conclusion, Morocco's NQF is still in the adoption phase and has not progressed to the activation phase.

With the aim of consolidating the right of individuals to lifelong learning (LLL), a system for validating prior learning from work experience is in operation.

In 2008, the DFP of the MIEPEEC introduced a system to validate prior learning from professional experience for employees; this system evaluates and validates the outcomes of an individual's professional experience and provides a professional certificate which is recognised in the same way as vocational training certificates. Validation of prior learning from work experience has been rolled out in the building and public works, textiles and clothing, and meat processing sectors, as well as for craftspeople who are members of chambers of crafts. In addition to agreements to implement validation of prior learning in the craft sector made between 2019 and 2023, four new agreements to implement such validation for craftspeople were signed in 2024 with the chambers of crafts in the regions of Marrakech-Safi, Tangier-Tetuan-Al Hoceima, Oriental and Souss-Maasa.

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 in Higher Education and Scientific Research (ANEAQ – *Agence nationale d'évaluation et d'assurance qualité de l'enseignement supérieur et de la recherche scientifique*) is responsible for the accreditation process. The ANEAQ assesses requests for the creation of new state and private universities and other higher education institutions, as well as requests for accreditation of academic programmes. It publishes summary reports which are used in debates on accreditation by the National Commission for the Coordination of Higher Education (CNCES – *Commission nationale de coordination de l'enseignement supérieur*), a regulatory body composed of stakeholders from the public and private sectors. On the basis of CNCES recommendations, the Ministry of Higher Education, Scientific Research and Innovation publishes the final decisions on accreditation and authorisation in official ministerial notes.

The ANEAQ evaluates academic programmes on the basis of national pedagogical standards established for different fields and qualifications. Programmes that meet these standards are accredited for a period of 5 years (Sanga, 2022).

Nevertheless, the quality of education in state schools has been deteriorating for years and private institutions continue to increase their market share (World Bank, 2022). The new strategy provides various measures to address this disparity. For example, from September 2022, applicants for teaching positions in primary and secondary schools must have at least a bachelor's degree and complete a 1-year 'specialisation' training course. This measure aims to ensure the quality of training and hiring of teachers.

The DFP of the MIEPEEC is solely responsible for quality assurance in the vocational training system, from the design of quality assurance measures to their implementation, in close collaboration with all stakeholders involved. The education roadmap and the framework law on education provide for the establishment of a strengthened quality assurance system, with procedures to be defined in the implementing legislation currently being drawn up.

The quality assurance cycle for the vocational training system is made up of the following four stages:

1. an internal evaluation, called the 'Integrated National Self-Assessment System for Vocational Training Institutions (SNIAEV – *Système National Intégré d'Auto-évaluation des Établissements de la Formation Professionnelle*);
2. an external evaluation, carried out by independent auditors on the basis of external evaluation standards;
3. a national label for institutions that have demonstrated that they have an established, fully fledged system during external evaluation;
4. ISO 21001:2018 international certification granted by accredited bodies.

Each stage is a stepping stone to the next stage. The recognition of institutions' internal quality assurance is progressive, in accordance with the implementation of reference standards for external evaluation and the requirements of ISO 21001: 2018.

The DFP has applied to the Millennium Challenge Account-Morocco Agency (MCA Morocco) to receive financial support relating to:

- the design of an external evaluation system, based on the unified national self-assessment system, to enable continuous improvement in the quality of training provided by training establishments under public and private operators;
- the development of a quality reference/standard and a labelling procedure for training establishments;
- a proposal for a regulatory and legal basis to institutionalise evaluation and labelling, ensuring they last into the future;
- the design and production of a visual identity and an institutional film on the evaluation and quality assurance system in vocational training (DFP, 2023).

Workplace-based training

VET offers three methods of training: residential training, apprenticeship training and alternance training.

- **Residential training** is provided in public and private institutions and includes a period of work experience as part of the training. Work experience taking place within the year lasts 1 to 2 months. This is the main form of training in relation to the total number of trainees enrolled.
- **Apprenticeship training** is an apprenticeship-based training programme in which students/trainees usually spend 80% of their training time in a company or in a professional traineeship (practical training). The rest of the time is spent on training at a vocational training centre, where students learn the theory and concepts needed for their apprenticeship.
- **Alternance training** involves spending 50% of the training time in a company and at least a third of the training time in a vocational training establishment.

Adopting laws and setting up appropriate administrative frameworks make it possible to create the necessary governance systems at national, regional and local levels, in order to optimise work-based learning experiences and keep the opportunities going. These frameworks also demonstrate government leadership and can provide mechanisms for mobilising social partners and employers, as well as students and their parents. They can also be used to establish and develop working

relationships that enable vocational training institutions to engage in dialogue with the local community (e.g. through advisory committees), as well as to provide relevant technical and vocational education and training systems, especially work-based learning mechanisms that are both accessible and productive (UNESCO, 2021).

However, despite these undeniable institutional efforts, the number of students choosing the apprenticeship route remains low in practice. Indeed, of the 377 873 trainees (public and private institutions) in 2023, only 23 927 completed apprenticeship training (15.79%). Similarly, with regard to students successfully completing their courses, out of 146 861 students (public and private institutions), only 21 458 (6.8%) completed apprenticeship training (DFP, 2023).

Morocco invests little in work-based training compared with the OECD average. Furthermore, work-based training in Morocco covers both workplace-based training and alternance training, and each pathway is governed by a different law and set of regulations (Law 12.00 and Law 36.90, respectively). This fragmented landscape is an obstacle to harmonisation and large-scale reform efforts. In addition, work-based learning is funded mainly by the state, while alternance training depends mainly on tax deductions (1.6% of total salaries). In both cases, the OFPPT manages funds and implementation, which raises questions about transparency and coordination.

Education and digital skills

At the beginning of 2022, the internet penetration rate in Morocco stood at 84.1% of the total population. In other words, these user figures reveal that 5.96 million people in Morocco were not using the internet at the start of 2022, meaning that 15.9% of the population was offline.

A new digital transition strategy called 'Digital Morocco 2030' was developed in 2023 and is currently going through the adoption process. The aim of this strategy is to make digital technology a lever for the socio-economic development of the kingdom, thereby responding to the needs of its citizens. It covers several areas, including digital government, governance, the legal framework, data, change management, skills and digital infrastructures. In particular, it aims to achieve the digital inclusion of a large part of society.

The level of skills in information and communication technologies (ICTs) is low in Morocco. The figures highlight significant disparities in digital skills. The most common skills include copying and pasting to duplicate or move information in a document (56.53%), sending emails with attachments (41.53%) and finding, downloading, installing and configuring software (40.30%). However, crucial skills such as writing computer programs (10.06%) and checking the reliability of online information (19.24%) have lower rates. This highlights the need to invest in targeted training programmes to stimulate the adoption of and adaptation to new technologies and artificial intelligence (AI) in Morocco (PCNS, 2024a).

Noteworthy responses include that of ANAPEC which has developed a digital strategy based on internet, telephone and digital tools to improve the quality of services and increase the number of young users. In addition, MARWAN (the Moroccan education and research network) is trying to interconnect all Moroccan universities and educational institutions. This project focuses on education, training and research. The latest version of the network allows universities to access high-speed internet (between 2 and 100 Mbps) thanks to its connection to the 'GÉANT' network, reserved for university use.

Education and training statistics

The High Commission for Planning (HCP – *Haut-Commissariat au Plan*) is the national office of statistics. The website provides data on most aspects of the social situation, work, education and health of the population. Other reliable sources in Morocco include the High Council for Education, Training and Scientific Research (CSEFRS), as well as international sources such as UNESCO and the World Bank.

The National Observatory for the Labour Market (ONMT – *Observatoire National du Marché du Travail*), on its own initiative or in collaboration with partners, carries out prospective studies on the

labour market with the aim of analysing the evolution of jobs, professions and skills in view of the multiple economic, technological, demographic and societal challenges. The ultimate aim is to identify the national economy's requirements in terms of jobs and skills and, consequently, to draw up recommendations to enable the training sector to update its initial and continuing provision to effectively meet these requirements.

3. LABOUR MARKET AND EMPLOYMENT

3.1 Trends and challenges

Characteristics of the labour market

Although the income of employees doubled between 2000 and 2018, the creation of new jobs did not follow and joblessness remains an obstacle to the prosperity of society. The Moroccan labour market faces three major challenges: lack of inclusion (women and young people are less integrated into the labour market than adult men), weak employment growth, and the predominance of poor-quality and low-skilled jobs. Despite the implementation of numerous public employment policies, economic growth has not translated into the creation of decent jobs. According to the World Bank, only 129 000 jobs are created each year, while the working-age population increases by 300 000 people a year (Díaz-Cassou et al., 2021). In addition, the incidence of vulnerable employment remains high, at 42.5% in 2022, although this decreased compared with 2020 when it was 44.6%. This highlights the persistence of precarious working conditions, despite efforts to improve the labour market situation.

Today, the Moroccan labour market faces complex and interconnected challenges, the most important of which is matching labour supply and demand, while ensuring that the skills of jobseekers are in line with the needs of employers. This is reflected in the strong social demand for decent employment in the context of an advanced demographic transition, accompanied by increased urbanisation and a rise in needs in terms of access to basic social services (PCNS, 2024b). Effective measures are needed to stimulate the creation of better jobs and to strengthen social protection for workers in Morocco.

Furthermore, the labour market in Morocco is also exposed to a decline in participation, with extremely low participation rates among young people and women. The participation rate (of people aged 15 and over) was 19% for women and 69% for men in 2023. The decline in participation is mainly due to the decline in female participation: the participation rate has fluctuated between 69% and 71.5% since 2015 for men, while it has decreased from 24.8% to 19% for women in 2023.

This highlights the problem of women's economic empowerment, with one of the highest gender participation gaps in the world. The new development model places strengthening women's economic inclusion at the heart of its policy choices and aims to increase their participation rate to 45% by 2035, from 22% in 2021. Closing the gap in participation rates between men and women could therefore lead to an increase in GDP of 39.5% (OECD, 2024).

In 2022, the results of the national employment survey showed that the total working-age population (15 and over) is about 27.5 million people, of whom 12.19 million are active (10.74 million employed and 1.44 million unemployed). The active population decreased by 0.72% compared with 2021; this decrease affected mainly rural areas (-3.6%), unlike the urban active population, which increased significantly (by 1.1%). The inactive population is around 15.3 million; almost three quarters of those inactive (73.1%) are women, 68.8% live in urban areas, more than half (51.1%) have no qualifications and 44.9% are aged 15 to 34 (ONMT, 2023).

In 2023, the unemployment rate reached 13% and showed an increase of 1.2 points compared with 2022 (11.8%). Analysing the unemployment rate according to qualitative variables (gender, age group, graduate or non-graduate, region) shows that the unemployment rate conceals great disparities. The unemployment rate remains higher among women (18.3% in 2023) compared with men (11.5% in 2023). The unemployment rate among young people (aged 15-24) is particularly worrying, reaching 35.8% in total, 32% for young men and 47.5% for young women (HCP figures).

Unemployment presents a worrying irregularity to the disadvantage of graduate populations, illustrating a mismatch between workers' qualifications and market requirements. The unemployment rate for highly skilled individuals (top tier) is 25.9%, compared with 15.8% for the medium-skilled and 4.9% for the unskilled. In addition, there are still major inequalities between the unemployment rate in urban areas (16.8%) and in rural areas (6.3%) (PCNS, 2024b).

Labour market and employment statistics

The High Commission for Planning (HCP) is the main producer of statistical, demographic, economic and social information. The HCP website is very comprehensive, with publications on various subjects, survey reports and databases.

The National Observatory for the Labour Market (ONMT) is now fully operational, with a multidisciplinary team of 25 people, a dedicated budget and its own premises. The creation of the Observatory contributes to the gradual construction of a labour market observation system with a network of observatories at central, sector and regional levels. The Observatory regularly publishes labour market reports, monthly newsletters on various subjects, bulletins and technical documents. Online content has been steadily growing and the platform is now an important source of employment data and analysis.

Morocco could benefit from an integrated system linking information on job vacancies, skills needs, training opportunities and labour market trends. An attempt has been made with the creation of the MARSSAD digital platform as part of a project led by the ONMT and ANAPEC, in cooperation with the Millennium Challenge Corporation (MCC) and in partnership with a consortium centred on the Université Mohammed VI Polytechnique. Unfortunately, the platform is not yet operational.

In principle, interprofessional advisory support groups (GIAC – *groupements interprofessionnels d'aide au conseil*) which were created by professional federations, are responsible for analysing future skills needs in the various sectors. However, there does not seem to be a system at national level to predict future skills needs in the various priority economic sectors. Often, it is international institutions, such as the ILO, ETF and EBRD, that carry out analyses to predict the skills needs in various sectors (textiles, automotive, agri-food, etc.).

3.2 Employment policy and institutional framework

Strategy and legal framework in employment policy

The national employment strategy (NES) aims to create at least 200 000 jobs a year between 2015 and 2025. It was drawn up by the MIEPEEC and adopted by the government in 2015. The aim of the NES is to promote job-rich economic growth and address all labour market deficiencies, including unemployment, underemployment, informal work, inactivity and discouragement, taking into account categories of the population at high risk of exclusion (young people, women, informal and rural workers, and the unskilled or low-skilled).

The national employment strategy 2015-2025 was reviewed in 2021 and now includes a government programme and a national action plan which will run until 2026. The current version advocates progress in the areas of human capital development (including by strengthening work-based training and language skills), labour market governance, job creation and the improvement of access-to-work programmes.

A mid-term review of the NES took place in 2022. This review showed that the strategy and the national employment promotion plan (PNPE – *Plan National de Promotion de l'Emploi*), designed to put it into operation, have not succeeded in changing the dynamics of the labour market. During the strategy implementation period, economic growth continued to be driven by capital accumulation and growth in labour productivity, while the demand for labour remained almost constant and employment indicators deteriorated. The review report recommended that Morocco's new employment strategy be anchored in the new development model (NDM) and be aligned with the central objectives set out in the NDM: to raise the female participation rate to 45%; to ensure a per capita GDP growth rate of around 5% by 2035; and to increase the human capital index by 50% (ILO, 2022).

Initiatives to boost employment

In recent years, a considerable number of initiatives have been launched to address major challenges: persistent unemployment, a mismatch between skills and market requirements, and low participation of young people and women in the Moroccan labour market. The state has established active labour market policies (ALMPs) through the National Agency for the Promotion of Employment and Skills (ANAPEC).

ANAPEC's flagship programmes are as follows:

- the *Taehil* programme: aiming to increase employability through training;
- the *Idmaj* programme: supporting (since 2006) the transition of young people from school to work through placements with companies;
- the *Tahfiz* programme: aiming to promote employment through incentives for newly created businesses and associations;
- the *Auto-emploi* and *Forsa* programmes: encouraging self-employment and promoting entrepreneurship.

In 2024, with the support of the World Bank, the Policy Center for the New South (PCNS) published a report on active labour market policies in Morocco, with an analysis of the effectiveness of ANAPEC's flagship programmes. This assessment highlighted positive results in terms of job creation and improved employability. However, it is crucial to continue strengthening the effectiveness of these programmes, taking into account labour market segmentation, the diversity of beneficiaries and the specific characteristics of economic sectors.

The report made the following recommendations to improve the effectiveness of ALMPs:

- extend the programmes' target groups: include school drop-outs, young graduates from small towns, the long-term unemployed and people with disabilities;
- improve targeting: adapt programmes to the specific needs of each group of beneficiaries;
- strengthen support: provide personalised support and regular follow-up;
- strengthen coordination: improve collaboration between the different stakeholders involved in employment policies;
- adopt a territorial approach: adapt programmes to local areas and decentralise services;
- integrate new technologies: use technologies to facilitate access to training, information and employment services (PCNS, 2024b).

To improve skill matching in the labour market, the MIEPEEC is currently rolling out a 'skills passport' to help young graduates acquire the skills they need and thereby accelerate their transition to the world of work. It also provides for a number of work-based training methods to ensure that all segments of the population can access this type of training, in particular the NEETs. All these methods are in addition to investments aimed at supporting entrepreneurial skills and helping start-ups. The ministry is also taking measures to simplify the termination of employment contracts and is looking into changes to legislation so that Morocco can take advantage of new forms of work, such as platform-based working.

As for international cooperation, most support programmes are designed and implemented in partnership with the OFPPT (public VET provider) and ANAPEC.

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STATISTICAL APPENDIX – MOROCCO

The appendix presents the annual data for 2010, 2015, 2019, 2020, 2021 and 2022, or for the last available year.

	Indicator	2015	2019	2020	2021	2022	2023	
1	Total population ⁽¹⁾	34 680 500	36 304 400	36 688 800	37 076 600	37 458 000	37 840 000	
2	Relative size of youth population (15-24 age group and 15-64 denominator, %) ^{(1) c}	26.5	24.6	24.4	24.2	24.1	24.0	
3	GDP growth rate (%)	4.3	2.9	-7.2	8.0	1.3	3.2	
4	Gross value added by sector (%)	Agriculture	11.8	10.8	10.7	12.0	10.3	12.0
		Industry	25.6	25.2	26.0	25.8	25.5	23.8
		Services	52.2	53.5	53.2	51.9	54.5	53.9
5	Public spending on education (% of GDP)	5.1	5.0	6.3	5.6	5.8	M.D.	
6	Public spending on education (% of total public spending)	22.2	21.5	24.2	23.8	23.9	M.D.	
7	Adult literacy (%) ^c	M.D.	M.D.	M.D.	M.D.	77.3	M.D.	
8	Level of education of total population (over 15 years old) (%) ^c	Low ⁽²⁾	M.D.	M.D.	M.D.	M.D.	81.8	M.D.
		Medium ⁽³⁾	M.D.	M.D.	M.D.	M.D.	11.7	M.D.
		High ⁽⁴⁾	M.D.	M.D.	M.D.	M.D.	6.5	M.D.
9	Early leavers from education and training (aged 18-24) (%)	Total	M.D.	M.D.	M.D.	M.D.	M.D.	M.D.
		Men	M.D.	M.D.	M.D.	M.D.	M.D.	M.D.
		Women	M.D.	M.D.	M.D.	M.D.	M.D.	M.D.
10	Net enrolment rates in secondary education (ISCED level 2-3) (%)	Lower secondary	M.D.	89.2	90.8	91.1	95.5	97.6
		Upper secondary	M.D.	71.5	74.3	74.2	77.2	78.9
11	Proportion of VET pupils in upper-secondary education (ISCED level 3) (%)	M.D.	16.0	15.1	11.3	11.2	11.9	
12	Poor results in reading, maths and science – PISA (%)	Reading	N/A	73.3 ⁽⁵⁾	N/A	N/A	81.1	N/A
		Mathematics	N/A	75.6 ⁽⁵⁾	N/A	N/A	81.6	N/A
		Science	N/A	69.4 ⁽⁵⁾	N/A	N/A	75.5	N/A

	Indicator		2015	2019	2020	2021	2022	2023
13	Participation rate (15 years and over) (%)	Total	47.4	45.8	44.8	45.3	44.3	43.6
		Men	71.5	71.0	70.4	70.4	69.6	69.0
		Women	24.8	21.5	19.9	20.9	19.8	19.0
14	Inactivity rate (15 years and over) (%) ^c	Total	52.6	54.2	55.2	54.7	55.7	56.4
		Men	28.5	29.0	29.6	29.6	30.4	31.0
		Women	75.2	78.5	80.1	79.1	80.2	81.0
15	Employment rate (15 years and over) (%)	Total	42.8	41.6	39.4	39.7	39.1	38.0
		Men	64.8	65.5	62.9	M.D.	62.4 ^c	M.D.
		Women	22.2	18.6	16.7	M.D.	16.4 ^c	M.D.
16	Employment rate by level of education (15 years and over) (%) ^c	Low ⁽²⁾	M.D.	M.D.	M.D.	M.D.	38.1	M.D.
		Medium ⁽³⁾	M.D.	M.D.	M.D.	M.D.	39.7	M.D.
		High ⁽⁴⁾	M.D.	M.D.	M.D.	M.D.	50.5	M.D.
17	Employment by sector (%)	Agriculture	39.0	32.5	31.3	31.2	29.3	27.8
		Industry	20.6	22.5	22.9	22.9	23.2	23.8
		Services	40.4	44.9	45.7	45.8	47.4	48.3
18	Incidence of self-employment (%) ^c		51.0	47.3	46.6	45.5	44.7	M.D.
19	Incidence of vulnerable employment (%) ^c		48.8	44.9	44.6	43.3	42.5	M.D.
20	Unemployment rate (15 years and over) (%)	Total	9.7	9.2	11.9	12.3	11.8	13.0
		Men	9.4	7.8	10.7	10.9	10.3	11.5
		Women	10.5	13.5	16.2	16.8	17.2	18.3
21	Unemployment rate by level of education (15 years and over) (%)	Low ⁽⁶⁾	4.1	3.1	5.6	4.6	4.2	4.9
		Medium ⁽⁷⁾	15.6	12.4	15.5	15.9	14.1	15.8
		High ⁽⁸⁾	21.2	21.6	23.9	25.9	25.8	25.9
22	Unemployment rate (15-24 years) (%)	Total	20.8	24.9	31.2	31.8	32.7	35.8
		Men	20.6	22.0	28.0	28.4	28.7	32.0
		Women	21.4	33.4	41.2	41.9	44.4	47.5
23	Proportion of 15-24-year-olds not in	Total	35.1	33.9	35.4	33.8	33.1	32.9
		Men	16.5	15.7	17.6	16.0	15.2	15.0

	Indicator		2015	2019	2020	2021	2022	2023
	education, employment or training (NEETs) (%) ⁽¹⁾	Women	54.6	53.1	54.0	52.5	51.9	51.8
	Proportion of 15-29-year-olds not in education, employment or training (NEETs) (%)	Total	M.D.	M.D.	M.D.	M.D.	M.D.	M.D.
		Men	M.D.	M.D.	M.D.	M.D.	M.D.	M.D.
		Women	M.D.	M.D.	M.D.	M.D.	M.D.	M.D.
24	Participation in training/lifelong learning (15 years and over) (%)	Total	M.D.	M.D.	M.D.	M.D.	M.D.	M.D.
		Men	M.D.	M.D.	M.D.	M.D.	M.D.	M.D.
		Women	M.D.	M.D.	M.D.	M.D.	M.D.	M.D.
25	Human development index		0.656	0.684	0.683	0.688	0.698	M.D.

Last updated: 7.10.2024

Sources:

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

Indicators 10, 11: UNESCO Institute for Statistics

Indicators 13, 14, 15 (except 2022 for men and women), 17, 18 (except 2021, 2022), 19 (except 2021, 2022), 20, 21, 22: *Haut Commissariat au Plan* (High Commission for Planning)

Indicator 12: OECD's 2018 PISA assessment results (Volume I), Appendix B1; OECD's 2022 PISA results (Volume I)

Indicator 25: UNDP

Indicator 23: ILO modelled estimates

Indicators 8, 15 (2022 for men and women), 16, 18 (2021, 2022), 19 (2021, 2022): ILOSTAT

Remarks:

(1) Estimate

(2) Low: basic, less than basic (ILOSTAT)

(3) Medium: intermediate (ILOSTAT)

(4) High: advanced (ILOSTAT)

(5) PISA: 2019 applies to 2018

(6) Low: no diploma

(7) Medium: medium level

(8) High: high level

Legend:

C: ETF calculations

N/A: not applicable

M.D.: missing data

Appendix: definitions of indicators

	Description	Definition
1	Total population	The total population is the estimated number of habitual residents in a given country on 1 January of a given year. Where no information is available on the usually resident population, countries may report legal or registered residents.
2	Relative size of youth population (15-24 age group) (%)	This is the ratio of the youth population (aged 15 to 24) to the working-age population, usually aged 15 to 64 (or 15 to 74 or 15 and over).
3	GDP growth rate (%)	Annual growth rate as a percentage of GDP at market prices in constant local currency. Aggregates are based on constant United States dollars in 2010. GDP is the sum of gross value added by all resident producers in the economy, plus taxes on products and less any subsidies not included in the value of products. It is calculated without making deductions for depreciation of manufactured assets or for depletion and degradation of natural resources.
4	Gross value added by sector (%)	Share of value added from agriculture, industry and services. Agriculture corresponds to divisions 1-5 of the International Standard Industrial Classification of all Economic Activities (ISIC) and includes forestry, hunting and fishing, as well as crop and animal production. Value added is the net production of a sector after adding up all outputs and subtracting intermediate inputs. It is calculated without making deductions for depreciation of manufactured assets or for depletion and degradation of natural resources. The origin of value added is determined by the ISIC, revision 3 or 4. Industry corresponds to tabulation categories C-F (revision 3) or tabulation categories B-F (revision 4) of the International Standard Industrial Classification (ISIC) and includes mining and quarrying (as well as oil production), manufacturing, construction and utilities (electricity, gas and water). Services correspond to ISIC divisions 50 to 99 and include value added in wholesale and retail trade (including hotels and restaurants), transport, and government, financial, professional and personal services, such as education, healthcare and real estate services. It also includes imputed bank service charges, import duties and any statistical anomalies found by national compilers, as well as anomalies resulting from rescheduling.
5	Public spending on education (% of GDP)	Public spending on education expressed as a percentage of GDP. In general, the public sector finances education either by directly supporting the routine or capital expenditure of educational establishments, or by supporting students and their families with grants or public loans, as well as by awarding grants to private companies or non-profit organisations for educational activities (transfer to private households and companies). Both types of transactions are included in total public spending on education.
6	Public spending on education (% of total public spending)	Public spending on education expressed as a percentage of total public spending. In general, the public sector finances education either by directly supporting the routine or capital expenditure of educational establishments, or by supporting students and their families with grants or public loans, as well as by awarding grants to private companies or non-profit organisations for educational activities (transfer to private households and companies). Both types of transactions are included in total public spending on education.
7	Adult literacy (%)	Adult literacy is the percentage of the population aged 15 and over who can read, write and understand a short, simple sentence about their daily lives. In general, literacy also encompasses 'numeracy', that is, the ability to do simple arithmetic calculations.
8	Level of education of total population (over 15 years old) (%)	Level of educational refers to the highest level of studies attained by individuals, expressed as a percentage of all persons in this age group. This indicator is most often measured on the basis of the highest educational programme successfully completed and is usually validated by a recognised qualification. Recognised intermediate qualifications are classified at a lower level than that of the programme itself.

	Description	Definition
9	Early leavers from education and training (aged 18-24) (%)	This indicator is defined as the percentage of the population aged 18 to 24 with a maximum lower-secondary level of studies and having received no education or training in the 4 weeks preceding the survey. Lower-secondary education corresponds to ISCED 1997 levels 0-2 and 3C short (i.e. programmes with a duration of less than 2 years) for data up to 2013, and ISCED 2011 levels 0-2 for data from 2014.
10	Net enrolment rates in secondary education (ISCED level 2-3) (%)	This indicator covers enrolments in a given level of education of children/young people who are in the official age group for that given level of education.
11	Proportion of VET pupils in upper-secondary education (ISCED level 3) (%)	The total number of students enrolled on vocational training programmes at a given level of study (in this case, upper-secondary education), expressed as a percentage of the total number of students enrolled on all programmes (vocational and general) at that level.
12	Poor results in reading, maths and science – PISA (%)	These are young people aged 15 whose results are below level 2 on the PISA scale for skills in reading, maths and science.
13	Participation rate (15 years and over) (%)	The participation rate for a given age group is calculated by dividing the active population by the population of that age group. The active population (also called 'labour force') is defined as the sum of employed and unemployed persons. The inactive population includes people who are classed neither as in work nor as unemployed.
14	Inactivity rate (15 years and over) (%) ^{(5)C}	The rate of inactivity/non-integration in the active population of a given age group is calculated by dividing the inactive population by the population of that age group. The inactive population includes people who are classed neither as in work nor as unemployed.
15	Employment rate (15 years and over) (%)	The employment rate is calculated by dividing the number of active people by the total population of the same age group. Active people is understood as all people who, during the reference period, worked for pay or profit for at least 1 hour, or who were temporarily absent from such work. If a different age group is used, this should be specified.
16	Employment rate by level of education (15 years and over) (%)	The employment rate is calculated by dividing the number of active people by the total population of the same age group. Active people is understood as all people who, during the reference period, worked for pay or profit for at least 1 hour, or who were temporarily absent from such work. If a different age group is used, this should be specified. Level of studies refers to the highest level of education successfully completed. Three levels are considered: low (ISCED levels 0-2), medium (ISCED levels 3-4) and high (ISCED 1997 levels 5-6 and ISCED 2011 levels 5-8).
17	Employment by sector (%)	This indicator provides information on the relative importance of different economic activities in terms of employment. Data is presented by major sectors of economic activity (i.e. agriculture/industry/services) based on the International Standard Industrial Classification of all Economic Activities (ISIC). In Europe, the NACE classification is consistent with the ISIC.
18	Incidence of self-employment (%)	The incidence of self-employment is expressed by self-employed workers (i.e. employers + own-account workers + contributing family workers) as a proportion of total employed workers.
19	Incidence of vulnerable employment (%)	The incidence of vulnerable employment is expressed by own-account workers and contributing family workers as a percentage of the total number of employed persons.
20	Unemployment rate (15 years and over) (%)	The unemployment rate represents the number of unemployed people as a percentage of the active population. The active population is the total number of people in work and those who are unemployed. Unemployed people are those aged 15 to 64 or over 15 who were without work during the reference week, who are currently available for work (i.e. to start an activity as an employee or self-employed person within 2 weeks of the reference week), who are actively seeking work (i.e. who had taken specific steps to find paid employment or self-employment for a period of 4 weeks ending at the end of the reference week) or who had found work and will start it within a period of up to 3 months.

	Description	Definition
21	Unemployment rate by level of education (15 years and over) (%)	The unemployment rate represents the number of unemployed people as a percentage of the active population. The active population is the total number of people in work and those who are unemployed. Unemployed people are those aged 15 to 64 or over 15 who were without work during the reference week, who are currently available for work (i.e. to start an activity as an employee or self-employed person within 2 weeks of the reference week), who are actively seeking work (i.e. who had taken specific steps to find paid employment or self-employment for a period of 4 weeks ending at the end of the reference week) or who had found work and will start it within a period of up to 3 months. Level of studies refers to the highest level of education successfully completed. Three levels are considered: low (ISCED levels 0-2), medium (ISCED levels 3-4) and high (ISCED 1997 levels 5-6 and ISCED 2011 levels 5-8).
22	Unemployment rate (15-24 years) (%)	The unemployment rate represents the number of unemployed people as a percentage of the active population. The active population is the total number of people in work and those who are unemployed. Unemployed people are those aged 15 to 24 who were without work during the reference week, who are currently available for work (i.e. to start an activity as an employee or self-employed person within 2 weeks of the reference week), who are actively seeking work (i.e. who had taken specific steps to find paid employment or self-employment for a period of 4 weeks ending at the end of the reference week) or who had found work and will start it within a period of up to 3 months.
23	Proportion of 15-24-year-olds not in education, employment or training (NEETs) (%) (5) C	This indicator provides information on young people aged 15 to 24 who fulfil the following two conditions: first, they are not employed (i.e. unemployed or inactive according to the ILO definition), and second, they have not received any education or training in the 4 weeks preceding the survey. Data is expressed as a percentage of the total population of the same age group and sex, excluding young people who did not answer the question about their participation in education and training.
24	Participation in training/lifelong learning (15 years and over) (%) (6)	Participants in lifelong learning refer to people aged 25 to 64 who responded that they had received education or training in the 4 weeks preceding the survey (numerator). The denominator is the total population of the same age group, excluding non-responses to the question about participation in education and training. The information collected concerns all forms of education or training, whether or not they are relevant to the respondent's current or future job. If a different reference period is used, this should be specified.
25	Human development index	This index is a summary measure of average outcomes in key dimensions of human development: a long and healthy life, being knowledgeable and having a decent standard of living.

ABBREVIATIONS

AFD	<i>(Agence française de développement)</i> French Development Agency
AfDB	African Development Bank
ALMP	Active labour market policy
ANAPEC	<i>(Agence nationale de promotion de l'emploi et des compétences)</i> National Agency for the Promotion of Employment and Skills
ANEAQ	<i>(Agence nationale d'évaluation et d'assurance qualité de l'enseignement supérieur et de la recherche scientifique)</i> National Agency for Evaluation and Quality Assurance in Higher Education and Scientific Research
ANLCA	<i>(Agence nationale de lutte contre l'analphabétisme)</i> National Agency to Combat Illiteracy
CMC	<i>(Cités des métiers et des compétences)</i> Vocational training centres
CNSS	<i>(Caisse nationale de sécurité sociale)</i> National Social Security Fund
CSEFRS	<i>(Conseil supérieur de l'éducation, de la formation et de la recherche scientifique)</i> High Council for Education, Training and Scientific Research
DFP	<i>(Département de la formation professionnelle)</i> Vocational Training Department
EIB	European Investment Bank
ESRI	Environmental Systems Research Institute
ETF	European Training Foundation
EU	European Union
Eurostat	Statistical Office of the European Union
GDP	Gross domestic product
GIZ	<i>(Deutsche Gesellschaft für Internationale Zusammenarbeit)</i> German agency for international cooperation
HCP	<i>(Haut Commissariat au Plan)</i> High Commission for Planning
ICT	Information and communication technologies
ILO	International Labour Organization
ISCED	International Standard Classification of Education
ISIC	International Standard Industrial Classification of all Economic Activities
MCA	Millennium Challenge Account
MCC	Millennium Challenge Corporation
MIEPEEC	<i>(Ministère de l'inclusion économique, de la petite entreprise, de l'emploi et des compétences)</i> Ministry for Economic Inclusion, Small Businesses, Employment and Skills
MSME	Micro-, small and medium-sized enterprises
NACE	<i>(Nomenclature statistique des activités économiques dans la Communauté européenne)</i> Statistical classification of economic activities in the European Community
NEET	Young people not in education, employment or training
NES	National employment strategy

NGO	Non-governmental organisation
NQF	National qualifications framework
OECD	Organisation for Economic Co-operation and Development
OFPPT	<i>(Office de la formation professionnelle et de la promotion du travail)</i> Office of Vocational Training and Work Promotion
OMTPME	<i>(Observatoire marocain des toutes petites, petites et moyennes entreprises)</i> Moroccan Observatory for Micro-, Small and Medium-Sized Enterprises
ONMT	<i>(Observatoire National du Marché du Travail)</i> National Observatory for the Labour Market
PIAFE	<i>(Programme intégré d'appui à la formation et à l'éducation)</i> Integrated training and education support programme in Morocco
PISA	Programme for International Student Assessment
PNEA	<i>(Programme national d'évaluation des acquis)</i> National learning assessment programme
PNPE	<i>(Plan national de promotion de l'emploi)</i> National employment promotion plan
PPP	Public-private partnership
RAMED	<i>(Régime marocain d'assistance médicale aux familles les plus vulnérables)</i> Moroccan medical assistance scheme for the most vulnerable families
SME	Small and medium-sized enterprises
TVET	Technical and vocational education and training
UN-DESA	United Nations Department of Economic and Social Affairs
UNDP	United Nations Development Programme
UNESCO	United Nations Educational, Scientific and Cultural Organization
UNICEF	United Nations Children's Fund
USAID	United States Agency for International Development
VET	Vocational education and training

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