

Labour Market Profile Morocco – 2020/2021



The profile provides a comprehensive overview of the labour market's structures, development, and challenges.

Danish Trade Union
Development Agency



ULANDSSEKRETARIATET – DTDA
DANISH TRADE UNION DEVELOPMENT AGENCY

PREFACE

Danish Trade Union Development Agency (DTDA) is the development organisation of the Danish trade union movement. This agency was established in 1987 by the two largest Danish confederations – Danish Federation of Trade Unions (Danish acronym: LO) and Danish Confederation of Professionals (Danish acronym: FTF). These confederations merged to become the Danish Trade Union Confederation (Danish acronym: FH) in January 2019. Correspondingly, former known as LO/FTF Council was changed to DTDA.

The work of DTDA is in line with the global Decent Work Agenda (DWA) based on its pillars: creating decent jobs, guaranteeing rights at work, extending social protection, and promoting social dialogue. The overall development objective of DTDA's interventions in the South is to eradicate poverty and support the development of just and democratic societies by furthering the DWA.

DTDA works in partnership collaboration with trade union organisations in Africa, Asia, Latin America, and the Middle East. The immediate objective of the programme implementation is to assist the partner organisations in becoming change-agents in their own national and regional labour market context, capable of achieving tangible improvements in the national DWA conditions, and towards the achievement of the labour-related Sustainable Development Goals (SDGs).

The format of the Labour Market Profile (LMP) provides a comprehensive overview of the labour market situation in the individual countries of engagement. The profile is divided into nine thematic sections describing the economic performance, labour legislation, social partners, social dialogue, violations of trade union rights, working conditions, the general status of the workforce, education, and social protection.

In the framework of DWA and SDGs, LMPs are following several central indicators addressing aspects of labour market development, especially the unionism evolution, social dialogue and bi-/tri-partite mechanisms, policy

development and legal reforms, status vis-à-vis ILO conventions and labour standards, among others.

Primary sources of data and information for LMPs are:

- As part of programme implementation and monitoring, national partner organisations provide annual narrative progress reports, including information on labour market developments.
- National statistical institutions and international databanks are used as a source for collection of general (statistical) data and information such as ILOSTAT and NATLEX, World Bank Open Data, ITUC Survey of Violations of Trade Union Rights, the U.S. Department of State as well as other international recognised labour-related global indexes.
- Academia and media sources (e.g. LabourStart, national news, among others) are furthermore used in the available research on labour market issues.

Labour Market Profiles for more than 30 countries are available on DTDA's website:

<https://www.ulandssekretariatet.dk/>.

DTDA prepared the Labour Market Profile in collaboration with the DTDA MENA sub-Regional Office in Tunisia. If any comments or questions arise for the profile, please contact Mr. Kasper Andersen (kan@dtda.dk) from DTDA.

Cover Photo: factory worker from Morocco photographed by Mr. Moltzen.

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EXECUTIVE SUMMARY

Morocco's economic growth has been relatively high, at 3.4% on average during the last decade. Labour productivity stays low compared to the Northern Africa average due to the volatile agricultural sector and fragile integration of the industry and service sectors. Minimum wages have increased in real terms, notably in the public sector. It backed a growing middle-class reaching approximately 77% among the employed in 2020. The economic recession in 2020, as an impact of the global coronavirus (COVID-19) pandemic, infused a hike in unemployment and put many people balancing on the poverty threshold line.

Several labour-related reforms were launched during the 2010s. Three international ILO conventions concerning Occupational Safety and Health (OSH), migration for employment, and social security were ratified in June 2019. It is important to realise that around one out of two Moroccan workers operates in the informal economy that loopholes in labour and business regulations, often due to lack of awareness or incentives.

Several tripartite mechanisms are operational, but labour-relations are challenged in practice, e.g. Moroccan employers often consider cooperation in labour-employer relations at low-medium ranking. Tensions mounted between the government and the trade union movement in recent years. To cool the social dialogue frictions, the government, trade unions, and employers' organisation signed the Social Dialogue Agreement in April 2019 to improve tripartite consultation on work-related issues. This agreement has not yet reached significant improvements in the tripartite negotiations.

Enterprises with at least 50 workers are required to organise bipartite OSH committees. Since a large majority is micro- or small enterprises most pass this regulation. Bipartite collective bargaining agreements' coverage is meagre but under development. Unionism is contested in raising the membership rate from several fronts. The trade union density of employment reached 6.9% in 2019, which was relatively low in comparison to other Northern Africa countries. Organised workers are countered by "regular violations of rights", according to the Global Rights Index.

The population's structure changed because of the declining fertility rate and halving the dependency ratio.

A declining trend of the labour force participation rate accelerated during the 2010s, especially among youth, which was part of the considerable upturn in school enrolment on all levels. Alterations in the employment structure progressed in the projected intensifying share of employees (i.e. workers who hold paid employment jobs) moving from the agricultural sector to the service sector. The employment share in the industry sector dropped on the margin, especially for women in the manufacturing sector.

The rising youth unemployment rate during the 2010s and pervasive long-term unemployment echoed the underlying weaknesses of the labour market and economy. These factors linked the lack of inclusion in the labour market sticking to youth and women. Low quality of jobs caught by informal employment furthermore grasps gaps in social protection coverage.

The Moroccan out-migration flow faced brain-drain for decades. Personal remittances became a significant part of the economy, and its volume hovered above the foreign direct investments. The entry to Europe has become increasingly difficult for African job-seeker migrants and around 700,000 ends settled in Morocco. They mostly lack legal status and end operating in the informal economy. An impact of COVID-19 tightened the influx of asylum seekers and put many in critical health situations and further economic insecurity in limbo.

During the last two decades, the declining child labour rate was aided by impressive growth in school enrolment as well as curbing the gender gaps. Nevertheless, the quality of the education system has been blighted by severe drop-outs rates; and around one out of three in employment have less than basic education.

The country's social security system is fragmented with deep coverage disparities. Although the social protection coverage concerning insurance or health assistance scheme has increased significantly during the 2010s, the private out-of-pocket health expenditure rests high. In recent years, the novel health insurance scheme for self-employed workers and the Job Loss Allowance Code demonstrated modest results in the scope. A reform of the few pending subsidies schemes is stalled shielded by the low international energy prices, and to avoid its potential significant increase in poverty.

The table below presents key labour market indicators in the framework of the Decent Work Agenda (DWA) that are related to central unionism issues.

On the next page, Page iv, the second table presents an overview of the current value and targets of the Sustainable Development Goals indicators' in relation to the labour market issues.

Status of key labour market indicators in the framework of the Decent Work Agenda (DWA) in Morocco

Creating decent jobs	
Policy reforms addressing creation of decent employment	Yes, active labour programmes on wage subsidies for unemployed graduates, youth training, and entrepreneurship promotion through training and financial assistance have been implemented. Other sectoral plans (e.g. Morocco's Global Jobs and Moroccan Green Plan) aim to promote job creation through macroeconomic and sectoral policies (e.g., compensation reform, flexible exchange rate policy, pro-growth sector strategies).
ILO standard setting on improvement of status of workers from the informal economy	The only registered legislation related to the informal economy is Act No. 18-97 of 5 February 1999 on microcredit. A tripartite National Informal Economy Forum has not yet been established. The Cities of Trades and Competences programme to promote TVET and build the capacities of young people working in informal economy is planned to be launched in 2021.
Guaranteeing rights at work	
Growth in partner trade union members (%)	UMT, UGTM and CDT membership decreased 49% from 2012-2019.
Violations of trade union rights	Ranking 3 out of 5 (5+ is the worst). *
Labour legislation is improved according to ILO standards	Domestic Workers Law took effect in 2018. And, the government passed a bill in 2020 concerning fixed-term contracts that equal treatment between Moroccan and foreign employees.
Partner organisations with minimum 30% women representation in decision-making bodies	N/a
Extending social protection	
Coverage of social protection and labour programmes as % of total population in partner countries	41%.
Workers from the informal economy have access to national social security schemes	<i>Régime d'Assistance Médicale</i> (RAMED) covers for low-income Moroccans, such as those working in the informal economy. Just a minority of informal workers are covered in practice. In 2020, the government launched an ambitious goal to accelerate an expanding of social welfare protection to all its citizens within five years through a gradual approach. The Ministry of Economy and Finance recently announced that the finance bill of 2021 includes the objective of generalisation of social protection to allow the self-employed to benefit from family allowance, and on a later stage, the retirement and compensation for loss of employment.
Promoting social dialogue	
Trade union density of total employment (%)	6.9% (14% of employees).
Cooperation in labour-employer relations	Ranking 104 out of 141 (1 is best). **
Number of Collective Bargaining Agreements (CBAs)	N/a
Workers' coverage of Collective Bargaining Agreements to employees	15% based on the central tripartite agreement on wages from 2019.
Bi-/tri- partite agreements concluded	In recent years, social dialogue has been combative due to pension scheme reforms. A national tripartite agreement was concluded in April 2019, concerning wage increase in public and private sectors of 10% (5% 2020 and 5% in 2021).
* This is interpreted as a "regular violations of rights." It concerns government and/or companies are regularly interfering in collective labour rights and/or failing to fully guarantee important aspects of these rights (Global Rights Index, 2020).	
** This indicator is based on data from the Global Competitiveness Index's labour market efficiency indicator that represents employers' opinion from surveys. Sources: ILO, ITUC, World Economic Forum, DTDA research and own calculations on trade union density and CBAs coverage.	

Status of key Sustainable Development Goals in labour market related issues in Morocco

Indicators	Value	Year	SDG Targets
1.1.1: Working poverty rate (percentage of employed living below US\$1.9 PPP)	0.4%	2020	By 2030, eradicate extreme poverty for all people everywhere, currently measured as people living on less than \$1.25 a day
1.3.1: The population effectively covered by a social protection system, including social protection floors.	40% *	2009	Implement nationally appropriate social protection systems and measures for all, including floors, and by 2030 achieve substantial coverage of the poor and the vulnerable
5.5.2: Women share of employment in managerial positions	13%	2018	Ensure women's full and effective participation and equal opportunities for leadership at all levels of decision-making in political, economic and public life
8.1.1: Annual growth rate of real GDP per capita	1.6%	2018	Sustain per capita economic growth in accordance with national circumstances and, in particular, at least 7 per cent gross domestic product growth per annum in the least developed countries
8.2.1: Annual growth rate of real GDP per employed person	-	-	Achieve higher levels of economic productivity through diversification, technological upgrading and innovation through a focus on high value-added and labour-intensive sectors
8.3.1: Proportion of informal employment in non-agriculture employment	-	-	Promote development-oriented policies that support productive activities, decent job creation, entrepreneurship, creativity and innovation, and encourage the formalisation and growth of micro-, small- and medium-sized enterprises, through access to financial services
8.3.1: Women	-	-	
8.3.1: Men	-	-	
8.5.1: Average hourly earnings of women and men employees	-	-	By 2030, achieve full and productive employment and decent work for all women and men, including young people and persons with disabilities, and equal pay for work of equal value
8.5.2: Unemployment rate (Total, 15+)	9.8%	2018	
8.5.2: Women, 15+	14%	2018	
8.5.2: Women, 15-24 years	39%	2018	
8.5.2: Men, 15+	8.4%	2018	
8.5.2: Men, 15-24 years	25%	2018	
8.6.1: Proportion of youth (15-24 years) not in education, employment or training)	-	-	By 2020, substantially reduce the proportion of youth not in employment, education or training
8.7.1: Proportion and number of children aged 5-17 years engaged in child labour (Total)	-	-	Take immediate and effective measures to eradicate forced labour, end modern slavery and human trafficking and secure the prohibition and elimination of the worst forms of child labour, including recruitment and use of child soldiers, and by 2025, end child labour in all its forms
8.7.1: Girls	-	-	
8.7.1: Boys	-	-	
8.8.1: Frequency rates of fatal and non-fatal occupational injuries	-	-	Protect labour rights and promote safe and secure working environments for all workers, including migrant workers, in particular women migrants, and those in precarious employment
8.8.2: Level of national compliance with labour rights (freedom of association and collective bargaining)	-	-	
9.2.2: Manufacturing employment as a proportion of total employment	11%	2012	Promote inclusive and sustainable industrialisation and, by 2030, significantly raise industry's share of employment and gross domestic product, in line with national circumstances, and double its share in least developed countries
10.4.1: Labour income share as a percent of GDP	44%	2017	Adopt policies, especially fiscal, wage and social protection policies, and progressively achieve greater equality

* Persons above retirement age receiving a pension (see also Table 21).

Source: [United Nations, Sustainable Development Goals, Knowledge Platform](#), [UNICEF 2016](#) and [ILO, Key Indicators of the Labour Market \(KILM\)](#)

COUNTRY MAP



Source: [CIA, World Factbook](#)

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ECONOMIC PERFORMANCE

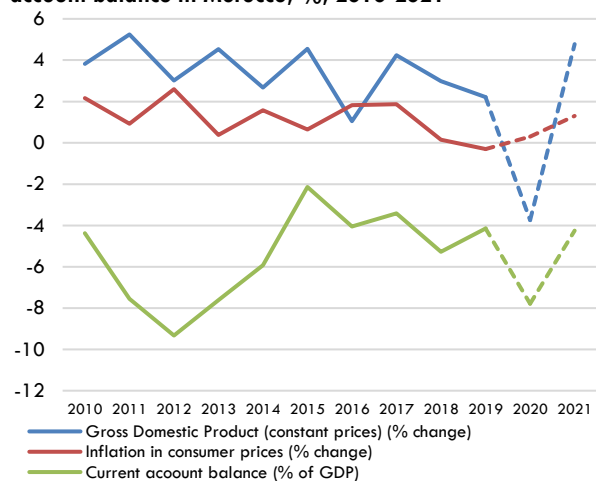
Morocco is a lower-middle-income country and ranked 5th in Africa in terms of Gross Domestic Product (GDP) volume. The country is considered the most competitive economy in Northern Africa. The GDP per capita growth was estimated at 2.1% on average in the period from 2010 to 2019, which was higher than the MENA (excluding high income) average at 1.0%. In recent years, the growth experienced a downward as shrinkage of agricultural output due to drought and modest non-agricultural expansion. This situation further plunged into a potentially deep recession in 2020 as an impact of the global coronavirus (COVID-19) pandemic leading to disruptions to tourism and trade (see Table 1 and Figure 1).¹

Table 1: Key economic data in Morocco, 2019

GDP (current US\$)	US\$ 119 billion
GDP per capita (current US\$)	US\$ 3,204
GDP per capita growth (2015-2019, average)	1.7 %
General government consumption expenditure (% of GDP)	18 %
Tax revenue (% of GDP)	22 %

Sources: World Bank, World Development Indicators

Figure 1: Gross Domestic Product, inflation, and current account balance in Morocco, %, 2010-2021



Source: IMF, World Economic Outlook Database

Morocco is ranking 147 out of 229 (1 is best) when it comes to GDP per capita in purchasing power parity (PPP - comparable baskets of goods to compare purchasing power across countries).² GDP per capita (current US\$) was slightly lower than the MENA average, US\$3,204 and US\$3,794, respectively.

The inflation in consumer prices has been consistently stable during the last decade of 1.2% on average, lower than the regional average of 2.7%. This relative low

inflation rate benefited from prudent monetary policies and an inflation-targeting framework, not to mention the declining import prices such as the international costs in fossil fuels in recent years. Higher salaries and low inflation have supported private consumption, which contributed the economic growth.

Inequality measured in the distribution of family income is measured through the Gini index, which estimated value of 40 (0 represents perfect equality, while 100 implies extreme inequality).³ Inequality is more rampant in Morocco than Tunisia and Algeria, indexed at 33 and 28, respectively. Few are working poor living below US\$3.2 per day among the employment, and the middle-class grew fast by 36 percentage points from 2000 to 2019 (Table 2). This evolution is reflected in the growing segment of employees supported by structural economic reforms (see more in Workforce section). However, around 59% of the workforce are economically inactive and excluded from the economic class projections. The broader national poverty headcount ratio fell from 15% in 2000 to 4.8% in 2013, which was mainly widespread in rural areas. Another issue is that around 16% of the population live under constant threat of falling back into poverty due to lack of adequate social services in poorer regions and vulnerability to shocks.⁴ Estimates of the impact of COVID-19 suggested that the incidence of poverty could reach 6.6%, based on per capita income in 2020.⁵

Table 2: Estimation and projection of employment by economic class in Morocco, 2000-2019

Year	Extremely poor (<US\$1.90)	Moderately poor (>=US\$1.90 & <US\$3.20)	Near poor (>=US\$3.20 & <US\$5.5)	Middle class (>=US\$5.5)
2000	5.9 %	21 %	32 %	41 %
2010	1.4 %	9.9 %	27 %	62 %
2019	0.4 %	4.6 %	19 %	76 %

Note: Data in this table are based on imputed observations and exclude the economically inactive population that cover around 59% of the population (aged 15+).

Sources: ILO, Key Indicators of the Labour Market (KILM)

An impact of the global Coronavirus pandemic in 2020 is likely to further fuel the poverty increase, but the scope is not yet possible to determine. This pandemic has revealed the inequality, especially informal workers, are struggling to survive economically due to difficulties of financial coverage during times of crisis like this one with limited access to social insurance. Morocco announced in April 2020 that it has started to draw on a US\$3 billion credit line from the International Monetary Fund (IMF) to offset a contraction of its economy because of coronavirus pandemic.⁶

An increase in gross fixed capital formation signals how factors of production accumulate. It is the creation of aspects (e.g. office buildings, equipment, tools, machinery, computers, office materials, factories, and vehicles) that help an economy to produce more. When the indicator's value increases, capital stock and aggregate income increase, the production rises, and the country gets richer. A country needs to generate savings and investments from household savings or based on government policy, meaning that when people save more, capital formation increases.⁷ Data shows that the gross fixed capital formation in Morocco since 2000 has increased from 27% of GDP to 34% in 2008, to decrease down to 29% in 2019; the MENA average was seven percentage points lower at 22% of GDP in 2019.

Foreign Direct Investment (FDI) measures the ownership of businesses in a country by an entity based in another country. A high measure indicates a lasting management interest in an enterprise from abroad. In Morocco, the FDI has been fluctuating since 2000 and was situated at 2.5% of GDP on average in the period from 2015 to 2019; the MENA average was lower at 1.0%. It suggests that more companies from outside Morocco invest in Moroccan companies than in the MENA region in general. In contrast, personal remittances received in Morocco is significantly higher at 6.4% of GDP, which has become central for consumption (see also Migration section).

The Doing Business indexed Morocco as number 53 out of 190 countries (1 is best) in 2020 – an improvement from ranking 60 in 2019. Out of ten indicators, the country scores lowest on getting credit (119) and resolving insolvency (73). It scores best on dealing with construction permits (16) and paying taxes (24) (see more details in Appendix Table 23). Compared to countries in the region, Morocco is scoring better than Tunisia (78), Algeria (157), and Jordan (75). It is worthwhile to mention that this index provides a snapshot of the cost of complying with formal regulations for companies that are not small enough to loophole the law or large enough to curve it, according to media.⁸

Free Zones (FZ)

The legal framework for Free Zones Law was approved in 1994. The government established six Free Zones, which were set in Tangiers, Tanger Med Ksar el Majaz Mellousa 1 and 2, Dakhla and Laayoune, the free storage zone of hydrocarbons of Kbdana and Nador, and the export processing zone in Kenitra. In a business charter from 2016, which amended the Free Zones Law, the government committed to establishing new economic

areas in all 12 regions of the country. The strategy of creating specific interlinked sector-specialised areas was part of the Industrial Acceleration Plan, launched in 2014 to expand industrial development between 2014 and 2020. The aggregate industry sector has not increased its value-added share in the GDP during the 2010s (see ahead in Figure 8).

The FZ districts operate with fiscal incentives for the participating firms, to boost the establishment and development of industrial, commercial, and service activities. Companies located within the zones enjoy full corporate tax exemption during the first five years. In addition, companies are subject to a reduced tax rate of 8.75% for the following 20 years.⁹ Goods entering the zones are Value-added Taxed exempted. It is an obligation to export at least 85% of their production.

There are scarce data available on FZs' employment. Some data from 2006 suggested that 145,000 workers operated in two FZs, out of which approximately 20% were women.¹⁰ Activities in the EPZs are diverse and cover the textile sector (45%), electrical and electronic metallurgical industries (37%), services (7%), and agro-industry (7%).¹¹ Morocco has oriented some of its zones to high-tech activities, car manufacturing and aeronautics have increased in exports, as previously mentioned. The largest project is the transformation of the port at Tangiers into an international logistics hub.

In FZs, work contracts were not always written, and when they were, they were fixed-term contracts. Some companies did not respect the duration of maternity leave and that pregnant women suffered from intensive pressures to quit their jobs, mainly from management. It has also been noted that the wages declared were often below the wages paid, and many workers were not declared to the Social Security National Fund. Organising workers in these zones has been complicated, e.g. trade union access to the zones was heavily restricted, making freedom of association almost impossible in practice. Workers were too scared to form trade unions, for fear of losing their jobs. Although the Labour Code requires labour inspectors to enforce labour law provisions, trade union organisations have denounced the passivity and incapacity of the labour inspectorate. They stated that inspectors could not access the EPZs freely and that they did not reply to requests from workers to visit the workplaces.¹²

LABOUR LEGISLATION

The legislation regulates, sets standards, and restrictions for the labour market in Morocco. Most are based on Royal Decrees (*Dahirs*) and several have been repealed by the Labour Code. The country counted 675 labour-related legislatures in 2019 by ILO. A wide range of bills was approved in recent years as well as ratified three ILO Conventions in 2019 (see ahead and Appendix Table 24 and Table 25).

Some of the most central laws approved in recent years were the Pension Law and the Law Advances Domestic Workers' Rights, both from 2016. The former raised the retirement age from 60 to 63 for public sector employees (see more in Social Protection section). The latter was considered as ground-breaking for domestic workers in Morocco. Before the adoption of that law, domestic workers were excluded from the Labour Code, leaving them no legal rights to a minimum wage, limits on their hours, and not even a weekly day of rest.

Elections in Morocco are held on a national level for the legislature. Parliament has two chambers. First, the Assembly of Representatives of Morocco has 325 members elected for a five-year term, 295 elected in multi-seat constituencies, and 30 in national lists consisting only of women. Second, the Assembly of Councillors has 120 members, elected for a six-year term, elected by local councils (162 seats), professional chambers (91 seats), and wage-earners (27 seats). Collective representation has been under consolidation during the last decade. The second chamber of the parliament concerning the professional chambers have representation from the trade union movement and employers' organisations.

The employers' organisations are represented in professional chambers by eight delegated from CGEM, 20 delegates from the Chambers of Commerce, Industry and Services, and eight representatives from Chambers of Agriculture, Handicrafts and Fishing sectors. Trade unions are involved in the professional electoral base representing 20 trade unionists (elected by employee delegates).¹³ According to the final count of the mobilised electoral base, 50% voted for the trade union organisations in the running. In contrast, the remainder of the votes went to those 'without trade union affiliation' (French acronym: SAS). Based on the representativeness criteria (minimum of 6% at the national level), the UMT, CDT, UGTM, and UNTM were recognised as the most representative trade unions. Both FDT and ODT, as well

as other trade unions, dropped below the 6% threshold (Table 3, see also more in Social Partners section).

Table 3: Results of the professional elections, 2015.2020

Trade union centres	Total	Share
SAS *	17,399	50 %
UMT	6,175	18 %
CDT	3,240	9.3 %
UGTM	2,655	7.6 %
UNMT	2,572	7.4 %
FDT	1,339	3.8 %
ODT	644	1.8 %
Other trade unions	933	2.7 %
Total	34,946	100 %

* Without affiliation.

Source: Ministry of Employment and Social Affairs.

Status of the central labour legislation is summarised below.

Constitution¹⁴

In July 2011, a new constitution was approved by a popular referendum. The constitution was an aftermath of popular protests in February 2011 that was part of a wave of uprisings in Arab countries. A commission of experts wrote the new constitution appointed by the king rather than by an elected constituent assembly or any other representative body. A limited consultation process with stakeholders from civil society and political parties took place during the drafting process.¹⁵ The constitution introduced a transferring of several powers from the king to the prime minister, such as the power to appoint high-level civil servants, the power to grant amnesty and to preside over the meetings of the cabinet. The powers of the parliament were broadened. Despite these changes, the constitution arguably did not reduce the power of the king. The constitution recognises freedom of association, the right to strike and the freedom to join unions. The new constitution strengthens the role of trade unions as social and democratic players, maintaining a quota for their representation in the Second Chamber of the parliament.

In 2019, decentralisation was in focus, landmark reforms to be carried out in 2020 were promised aiming at improving manpower of local institutions or ability to promote policy change.¹⁶ An advisory committee was set up to address social and economic challenges to be submitted to the king in June 2020. This process was stalled somewhat due to the impact of COVID-19.

Labour Code¹⁷

The Labour Code was established by *Dahir* (royal decree) in 2003 after a tripartite process that took years. The code regulates employment relations,

working-age, maternity leave, working hours, occupational safety, health, wages, trade unions, employers' representation, and relevant councils. It also standardises the settlement of collective labour disputes (see more details in Appendix Table 27). The Code furthermore establishes mechanisms for social dialogue at the national and enterprise level as well as provides the legal framework for the national system of labour market governance. As a result of a tripartite review from 2014 of the Labour Code, a series of identified gaps and problematic areas in the Labour Code were identified, and it was assessed it would that time to be solved.¹⁸ In July 2020, the government passed a bill concerning fixed-term contracts, which was a procedure related to the enforcement of the labour code articles.

Before 2016, domestic workers were not covered by the Labour Code, thereby depriving them of the right to form unions.¹⁹ The entry into force in 2017 of Act. No. 19-12 fixing the working and employment conditions for men and women domestic workers, and the Bill concerning workers in traditional sectors. It improved their access to adequate dispute-resolution systems, the requirement of a standard contract, limits on working hours, a weekly rest day and a minimum wage.²⁰ However, many domestic workers still experience exploitation, and the new law offers less protection for domestic workers than the Labour Code does to other workers. Lack of awareness of the law limits workers' ability to defend their rights.

The draft law 15-97 on the right to strike, submitted to Parliament for approval, created tensions between trade unions and the government in 2019. The draft bill establishes a new legal framework concerning the basic rules and principles of exercising the right to strike. Parts of the trade union movement criticised the government's initiative since they were not consulted in accordance with the Social Dialogue Agreement framework, before submitting the draft (see more in Social Dialogue section).

Several independent unions are permitted by the Labour Law, and it requires 35% of the total employee base at a workplace to be associated with a union to be recognised as representative and able to engage in collective bargaining. The bill prohibits antiunion discrimination and companies from dismissing workers for participating in legitimate union-organising activities.

Social protection legal framework

Social protection is set by several obligatory system: i) Moroccan Retirement Fund, ii) Collective system for retirement wages payment, iii) National Fund for

collective reserve organisations, and iv) National Social Security Fund. A series of optional systems are also available. Generally, the social protection system is under a reform (see more in Social Protection section).

Observations on labour legislation

The International Trade Union Confederation (ITUC) has few observations of the labour-related legislation in Morocco concerning the international standards in the right to freedom of association and the right to strike.²¹ Main issues are:

- Restrictions on the right to elect representatives and self-administer in full freedom.
- Restrictions with respect to the type of strike action (e.g. pickets, wild-cat, working to rule, sit-down, go-slow).
- Authorities' or employers' power to unilaterally prohibit, limit, suspend or cease a strike action.

It is worthwhile to mention that agricultural workers are not covered by the Labour Code, thereby depriving them of the right to form unions. Also, around one out of two workers operate in the informal economy with loopholes in the labour and business regulations due to lack of awareness or incentives. The government is criticised for not adequately enforcing labour laws due to lack of inspection staff and resources.²²

Ratified ILO Conventions

Concerning Morocco's ratification of the international labour standards, a total of 65 ILO Conventions are ratified.²³ The conventions cover principles and rights at work. The latest ratified Conventions were Promotional Framework for Occupational Safety and Health Convention (C187), Migration for Employment Convention (C97), and Social Security (Minimum Standards) Convention (C102), and all in June 2019.

The eight ILO 'Fundamental Conventions' are the most important and fundamental. The nation has ratified seven of them, leaving out Freedom of Association and Protection of the Right to Organise Convention (C087).

ILO has designated four 'Governance Conventions' that are important to build national institutions and capacities that serve to promote employment, i.e. these conventions support a well-regulated and well-functioning labour market. The country has ratified all of these.

ILO has furthermore 178 'Technical Conventions', out of which 85 are "Up-To-Date" and actively promoted. An Up-To-Date Convention is one that is ready for ratification by member states and/or one that has been examined by the ILO Governing Body and deemed still to be relevant.²⁴ To date, Morocco has ratified 54 of the Technical Conventions, out of which 17 are "Up-To-Date" (see also Appendix Table 25).

The Committee of Experts on the Application of Conventions and Recommendations (CEACR) is an independent body composed of 20 legal experts at the national and international levels, charged with examining the application of ILO Conventions and Recommendations by ILO member states. In 2019, the committee made four direct requests to the Moroccan government, including providing information on application and development of conventions, take measures to guarantee the payment of minimum wage in the informal economy.

Labour policies

During the 2010s, a wide range of policies was launched for strengthening the labour market and its job creation. The main policies in recent years are summarised below.

The National Agency for the Promotion of Employment and Skills (ANAPEC) launched its 2020 Vision in 2015 to expand the agency's coverage to also include unqualified job seekers. ANAPEC also launched three active labour programs: *Idmaj* (wage subsidies for unemployed graduates); *Te'hil* (youth training); and *Moukawalati* (entrepreneurship promotion through training and financial assistance).²⁵

Other ministries have implemented strategies concerning i) youth integration, which plans to improve the training system and integrate youth into the labour market through internship or skill matching; ii) employment, which aims to increase employment and productivity; and iii) microenterprise promotion, which intends to support microenterprise financing). Many other sectoral plans aim to promote job creation through macroeconomic such as Morocco's Global Jobs and Moroccan Green Plan, as well as sectoral policies such as compensation reform, flexible exchange rate policy, pro-growth sector strategies, and accelerate an expanding of social welfare protection to all its citizens (see more in Social Protection section).

Trade Agreements

Trade agreements regulate international trade between two or more nations. An agreement may cover all imports

and exports, specific categories of goods, or a single category. A trade agreement is an opportunity to open another part of the world to domestic producers. Generally, trade agreements, including labour provisions, are on the rise but remains a minority and becoming increasingly accepted.

Morocco has been a member of World Trade Organisation (WTO) since January 1995 and a member of the General Agreement on Tariffs and Trade (GATT) since June 1987 that aims to liberalise trade agreements, and to establish a mechanism for resolving trade disputes. Regarding dispute cases involving Morocco: none as a complaint, three cases as respondent, and none as the third party.²⁶

Morocco has several Free Trade Agreements (FTAs) including with Egypt, Jordan, Tunisia, Turkey, the United Arab Emirates (UAE), and the United States; and has advanced trade status with the European Union (EU). The country also has signed FTA with the European Free Trade Association (EFTA), which is an intergovernmental organisation of Iceland, Liechtenstein, Norway, and Switzerland. Morocco has also begun FTA negotiations with Canada and several West African states.

Morocco is part of the Greater Arab Free Trade Area, which entered into force in 1998. It includes 16 other member states of the Arab League. The government council adopted a bill ratifying the agreement to establish the African Continental Free Trade Area (CFTA) in February 2019. The agreement aims to facilitate integration between African markets. Also, Morocco formally applied to join the Economic Community of West African States (ECOWAS) in February 2017. In November 2017, Morocco began negotiations with the South American trading bloc Mercosur to establish a free trade area.²⁷

Negotiations for a Deep and Comprehensive Free Trade Area (DCFTA) between the EU and Morocco were launched in March 2013. Four negotiating rounds have taken place so far, the most recent in April 2014. The DCFTA will build on the existing EU-Morocco Association Agreement, which entered into force in 2000 and created FTA between the EU and Morocco. The overall goal of the negotiations is to create new trade and investment opportunities and ensure better integration of Morocco's economy into the EU single market, not to mention bringing the Moroccan legislation closer to that of the EU in trade-related areas.²⁸ In the framework of the FTA, a protocol establishing a bilateral dispute

settlement mechanism was established and entered into force in 2012.

Morocco's FTA with the U.S. entered into force in 2006. This agreement is the only U.S. FTA on the continent of Africa. The U.S.-Morocco FTA is comprehensive and includes chapters detailing commitment on intellectual property rights, labour, and environmental protection. It includes both partners are obligated to enforce the four core ILO labour standards, as well as acceptable conditions of work, in a manner affecting trade.²⁹ Bribery of any form is outlawed, whistle-blowers are granted protection, and U.S. companies enjoy the same rights as Moroccan companies when investing in the country.

Alternative dispute resolution (ADR) has also merged in Morocco. Studies suggest there is a marked incompatibility between, on the one hand, contemporary approaches to ADR and conflict resolution deriving from perceived western values, and on the other hand, Islamic methods of dispute and conflict resolution based on legalistic tradition and history.³⁰

SOCIAL PARTNERS

Social partners are central to promote the realisation of core labour rights and social justice for workers by protecting freedom of association and collective bargaining. These organisations are usually represented as the government, trade unions, and employers' organisations.

Government

The Ministry of Employment and Social Affairs is responsible for developing and implementing government policies, laws and regulations in the areas of labour protection, employment and social protection of workers.³¹ The ministry is mandated to promote social dialogue, conduct labour related research, and expand employment opportunities.

The Ministry of Solidarity, Women, the Family and Social Development is responsible for promoting social development. The Ministry of National Education and Vocational Training is mandated to develop legislation and implement policies up to secondary school.

In Morocco, the High Commission for Planning (HPC) is the national statistical office that is responsible for producing economical, demographic, and social statistics, drawing up and evaluating the macroeconomic framework.³²

Trade Unions

The trade union movement is a central social force in Morocco. Geographically, Casablanca has an intense concentration of unions, while some unions have moved offices to the capital Rabat to engage more with the government. As mentioned, the country has still not ratified the international fundamental convention on Freedom of Association and Protection of the Right to Organise (C087).

A full dataset of the number of trade unions and membership rate was scarce. The three leading organisations – Moroccan Labour Union (UMT), General Moroccan Trade Union (UGTM), and Democratic Labour Confederation (CDT) – represented around 754,200 members in 2019. Trade union density of employees (paid employment jobs) was estimated at 14%, which was lower than the Northern Africa countries, except Jordan.³³ The total membership rate is slightly underestimated due to lack of data from three smaller trade union centres (UNMT, FDT, and ODT).

Table 4: Status of trade unions in Morocco, 2019

Trade union centres	6
National (sector) federations	59 *
Local/regional federations	135 *
Members of trade unions	754,200 **
Trade union density of employment	6.9 %
Trade union density of employees	14 %
Paying dues (UMT)	US\$10 per year

* Data from UMT and UGTM, excluding CDT. ** This number covers UMT, UGTM, and CDT.

Source: International Trade Union Confederation; DTDA SRO Tunisia and own estimations on trade union density by supported data from ILOSTAT.

Many unions are closely linked to politics and are not financially independent. The staff of the public sector unions is put at the disposal of the trade union by the government. Each representative union (UMT, CDT, UGTM, UNTM, and FDT) also receives government funding according to the election results they obtained in the professional elections. Among the trade union organisation with affiliation, UMT had the best result on the last professional elections of 18% in 2015 followed by CDT of 9.3%, UGTM of 7.6%, and UNMT of 7.4% (revisit Table 3).

According to data from ITUC, the aggregated trade union membership rate appeared to fall by 34% during the 2010s among the three main centres. This drop was mainly by UGTM but also CDT. In contrast, UMT experienced an upturn (see details in Table 5). The declining employment in the manufacturing sector

coupled with lack of protection for the implementation of the right to organise, the inexistence of a law governing union responsibility, and limitations to the advisory functions of trade unions fuelled the downturn in affiliated members. Generally, a lack of awareness of democratic values, widespread informality, and domination of micro-enterprises are also challenging the unionism.

Table 5: Main trade union centres membership trend in Morocco, 2012-2019

Centres	2012	2019	Share, 2019	Growth
UMT	335,000	400,000	53 %	19 %
UGTM	750,000	300,000	40 %	-60 %
CDT	61,500	54,200	7 %	-12 %
Total	1,146,500	754,200	100 %	-34 %

Sources: ITUC and International Training Centre.

Several large companies have a notable presence of unions: e.g. *Office Chérifien des Phosphates*, Morocco Telecom, the public television channel 2M, Royal Air Morocco, and the *Compagnie de Transports au Maroc* group.³⁴ Some improvements can be seen in bringing more women into leadership positions within the country's major trade unions (see more in Gender sub-section).³⁵ The Labour Code excludes migrant workers from assuming leadership positions in unions.³⁶

Three trade union centres – UMT, CDT, and Democratic Labour Federation (FDT) – signed a strategic agreement on united trade union action in January 2014. The alliance aimed at tackling anti-democratic and anti-popular policies as well as its outright dismissal of the trade union organisations' calls for a frank and constructive social dialogue.³⁷ The alliance was a historical step due to their common background and history, i.e. CDT sprung out from UMT, and FDT later from CDT. Previously the cooperation between them has been complicated. The three confederations now coordinate on policy positions and demands; organise joint events and demonstrations; and coordinate negotiations with the government. In some instances, UGTM and other confederations join these coordinated efforts.

Generally, UMT, CDT, UGTM, and the National Union of Moroccan Workers (UNTM) represent workers in the national dialogue. Many trade unions argued that the government refused to hold any meaningful dialogue over a series of issues, including wages, taxation, pensions, and labour legislation. For that reason, many trade unions have resorted to strike actions in recent years.³⁸

The unions have at various times been repressed in the forms of arrestation and disappearances of members. Even in 2019, CDT and UMT have suspended all social dialogue and instead launched campaigns to pressure the government to respect trade union rights.³⁹ In the same year, unions have launched a campaign against a draft law that violates the constitutional right to strike.⁴⁰ The draft has been written without consultation of trade unions (see more in Trade Union Rights Violations section). In addition, the bill proposed by the government in March 2020 on the use of social media was criticised by the trade unions and civil society as curbing the freedoms. Amidst the Corona crisis, trade unions in Morocco are mobilising and educating workers about their rights to protect themselves against the virus and agitate for healthy treatment of workers at the workplace.⁴¹

Status of the main three trade union centres participating in the national dialogue is summarised below.

Moroccan Labour Union (UMT)

UMT was established in 1955. It was active in the fight for independence from France, which has given the union historical legitimacy. Most other trade union centres have sprung from UMT. An often-voiced criticism of UMT is that it enjoys a range of privileges because of its historical position and has been reluctant to enter cooperation with the other trade union centres. UMT structures include the National Congress as well as representativity in central national tripartite institutions. The organisation registered 400,000 members in 2019 with a growth of approximately 19% since 2012. In total, 24 trade unions federations and associated federations are registered at the national level by UMT with a list of 23 national (sector) federations and 67 local/regional federations.

General Moroccan Trade Union (UGTM)

UGTM was established in 1960 as a breakaway from UMT. It is a conservative union and is linked to the conservative political Istiqlal party. The membership of the UGTM is granted to all employees, including temporary, casual, seasonal, retirees in the public sector, semi-public, territorial groups, private sector, transport or service professionals, and immigrants, among others. The organisation affiliates broadly academic institutions and trade union organisations, and declared 300,000 followers in 2019, which is a drastic decline from 755,000 members in 2012. Out of these 300,000 current followers, 54,200 are direct participants, and 2,644 paying dues.⁴² UGTM registered 36 affiliated sector federations and 68 local/regional federations.⁴³

Democratic Labour Confederation (CDT)

CDT was created in 1978, as it broke out of UMT over political questions. CDT has historically had ties to the political left, notably the socialist party USFP. Back in 2006, CDT adopted a negotiation instrument covering the principal demands of the organisation to address and negotiate issues at the workplace, including their arguments and their legal aspects. During the 2011 Arabic Spring movements in Morocco, CDT supported the protest movement M20. Moreover, as the only one of the most representative trade union centres that were against the proposed Constitutional amendments in 2011. The organisation declared 61,500 members in 2019 similarly since 2012.

Employers' Organisations

In 2020, 2.7% of the total employment in Morocco is estimated to consist of employers (see more on Figure 4). This share is smaller than the Nord African average on 7.0% and MENA average on 5.1%.

The Global Competitiveness Index provides the Moroccan employers' view on a wide range of aspects, including labour market efficiency (Table 6). The index is based on surveys among employers in Morocco. They consider the labour market as rigid; ranking 119 out of 141 countries (1st is the best). Some of the main issues are cooperation in labour-employer relations (104), women participation in the labour market (136) as well as lack of active labour market policies (114). Best scorings are in flexibility of wage determination (38).

Table 6: Labour market efficiency in Morocco, 2019

Indicator	Rank
Total	119
Cooperation in labour-employer relations	104
Flexibility of wage determination	38
Hiring and firing practices	73
Redundancy costs (weeks of salary)	96
Active labour market policies	114
Pay and productivity	85
Reliance on professional management	58
Worker's rights	52
Ease of hiring foreign labour	55
Internal labour mobility	36
Labour tax rate	100
Ratio of wage and salaried female workers to male workers	136

Note: Rank from 1 to 141 (1 is highest).

Source: The Global Competitiveness Report, 2019, 8th pillar: Labour market

Status of the primary two employers' organisations participating in the national dialogue is summarised below.

General Confederation of Moroccan Enterprises (CGEM)

CGEM is the main employers' organisation. It includes large industrial and commercial companies as well as small and medium-sized enterprises (SMEs). CGEM has 33 affiliated sectoral federations. The organisation operates with 22 commissions, which includes the Committee for Employment and Social relations that is related to collective bargaining agreements. The enrolment of member companies has been on the rise from 1,234 in 2000 up to 4,000 in 2015.⁴⁴ In 2019, CGEM registered 90,000 direct and affiliated members, which equals 27% of total employers, employing 2.9 million people and contributing to 55% of Morocco's GDP.⁴⁵ CGEM is a member of the International Organisation of Employers (IOE).

CGEM has close cooperation with UMT from the trade union movement, which partially can be explained by recurring exposure to collaboration via their seats of representation in state organisations dealing with the labour market issues, and from the fact that UMT is strong in the private sector.

Mainly small and family-owned businesses are often not members of employers' organisations; the same workplaces where trade unions have difficulty organising workers.

Due to the economic crisis resulting from the Covid-19 pandemic, the CGEM, the professional association of Moroccan Banks (GPBM), and the government signed a pact to support the Moroccan economic recovery, with focus on the tourism sector. The trade union organisations were not satisfied with their exclusion from this pact, therefore the King called for a tripartite social pact, for which the trade union movement is currently preparing their proposals.⁴⁶

The Federation of Chambers of Commerce, Industry and Services (FCCIS)

FCCIS is an association bringing together the regional Chambers of Commerce, Industry and Services and affiliation is obligatory. The organisation participates in bodies concerned with social dialogue. Reports show that FCCIS does not call itself as an employers' association ("patronat") and that it is seen by trade unions as a public entity. The federation covers an estimated 200,000

companies.⁴⁷ FCCIS is member of the International Organisation of Employers (IOE).

SOCIAL DIALOGUE

In Morocco, social dialogue at the national tripartite level took new steps during the last two decades. However, in recent years, the social dialogue went through a combative stage. Reforms were launched of the pension schemes along with fiscal consolidation, saving public expenditure and economic strategy targeting higher international competitiveness. The government did not meet its social dialogue commitments, and it triggered a series of protest and strike actions across the country. Several central trade union organisations such as CDT and UMT suspended all social dialogue in January 2019 and launched campaigns to force the government to respect trade union rights. To create reconciliation, the government, work unions, and the General Confederation of Enterprises of Morocco (CGEM) undersigned a Social Dialogue Agreement on April 25, 2019, stipulated the necessity of consultation between its three signatories, on work-related issues. The agreement requires the three parties to consult each other regarding Labour Code issues. Consultations aim to create a balance between the needs of businesses, the fight against precarious employment, and the preservation of employees' rights. According to the Ministry of Labour, 1,218 strikes were avoided in 2019, due to the promotion of social peace and dialogue in enterprises.⁴⁸

The previously mentioned draft law 15-97 on the right to strike, which was forwarded from the government to the parliament in August 2019, was observed by the unilateral draft bill to impose its decision and try to pass it through parliament, without the parties' consensus as agreed in the Social Dialogue Agreement.

Collective bargaining plays a role in the industrial relations' setting that outlines the working standards at enterprise levels in the country. Morocco has experienced an emergence of enterprises with stronger linkages to the national and international markets exemplified in collective bargaining. Part of this, enterprises with at least 50 workers were required to organise bipartite Occupational Safety and Health (OSH) committees and share reports on work-related accidents and diseases with the labour inspectorate since 2014.⁴⁹ It is noted that direct collaboration between labour inspectors, employees, and employers regarding workplace safety committees is in progress. Morocco also ratified the ILO Convention for Promotional Framework for Occupational Safety and Health Convention, 2006 (No. 187) in 2019.

Nevertheless, enterprises are still dominated by micro- and small-enterprises and widespread informality, which reduces the scope of OSH committees and complicates the coverage of inspections (see more in Working conditions and Workforce sections).⁵⁰

ITUC has few observations concerning the legal right to collective bargaining in Morocco. The critical issue is related to excessive requirements for trade unions' representability or a minimum number of members required to bargain collectively.⁵¹ This issue restricts the opportunity to reach collective agreements. On the other hand, the government generally respected the right to collective bargaining. At the sectoral level, trade unions negotiated with private employers concerning minimum wage, compensation, and other issues. However, employers have limited the scope of collective bargaining, frequently setting wages unilaterally for most unionised and nonunionised workers. Not to mention, labour disputes were common.⁵² It is worthwhile to mention that partakers in social dialogue often have different motives for entering the negotiations. For example, the government mainly see it as consultative, while employers expect an opportunity to make concrete proposals, and trade unions an opportunity for negotiations.⁵³ Social dialogue is not organised among workers and employers in the informal economy in any direct way (see also Informal Economy sub-section).

The Ministry of Employment and Social Affairs in Morocco registered 20 Collective Bargaining Agreements in force from 1978 to 2012. National official updated data were not available. Instead, UMT listed 10 CBAs from 2009 to 2020, mainly from recent years (see Appendix Table 26). Most of these latter CBAs have been at enterprise-level, but especially in 2019, a national tripartite agreement for wages was signed in both public and private sectors. The agreement included a wage increase for 800,000 employees, which covered 15% of employees (see more in Working Conditions section). UMT also concluded ten local agreement protocols in 2019, out of which two were with hotels, one was for shipping workers of Mohamed V airport shipping, and one covered 1,200 workers in a goods transport company. The benefits in most of these agreements were wage increases, improved pension schemes and promotion of social dialogue. Despite the number of institutions and the will to develop bipartite agreements, there are still few collective agreements, i.e. the total bargaining coverage via sectoral agreements is assessed very low.

Bipartite negotiations are under development in Morocco but still with some confusion. One of the central issues has been related to wage negotiations: the government-held individual bipartite discussions between trade unions and employers' organisations, and afterwards presented the new wages. Neither party signs the agreement, but both implicitly accept it.

Tripartite institutions

The Labour Code requires several tripartite bodies to be established. These fulfil functions such as regulate and give advice on labour policy, occupational safety and health, collective bargaining, and temporary employment.

Although the legal framework for tripartite social dialogue exists, the labour relations are criticised for working poorly in practice, often characterised by disagreements. Besides, the social dialogue bodies are assessed for meeting less frequently than envisaged in the labour code, not having an agenda combined with the absence of both members, planning and expertise.⁵⁴

In practice, the tripartite committees meet less frequently than envisaged in the Labour Code or the implementation decrees. Some trade unions have argued that some committees lacked incentives due to bodies with no authority, lack of planning and insufficient expertise. It is worthwhile to mention that no structural framework is available for promoting social dialogue at sectoral level. However, the national committees and the provincial committee on conflict resolution can encourage discussion and adoption of collective agreements.

Regulation of the main active labour-related tripartite organs is summarised below.

Council on Collective Bargaining

The Ministry of Employment and Social Affairs is leading this council, which composes 21 members based on the concerned ministries, CGEM, Chambers of Commerce, Chambers of Agriculture, and representative trade unions. It aims to promote and encourage collective bargaining at all levels. During 2016, the government held its first formal traditional tripartite social dialogue session since 2012. This hearing was mainly applied to discuss the pending pension reform legislation. The government also initiated separate meetings in 2017 with the social partners, including the heads of the UMT, the CDT, the UGTM, the UNTM then the Federation of Chambers of Commerce and Industry to resume contact with the parties.

In 2019, an association of trade unions had after three months of unsuccessful discussions about improved working conditions, accused the government of treason amid failing social dialogue.⁵⁵ The unions have announced that they no longer will tolerate the government's passivity and perceived lack of interest. If the government still fails to respond to the unions' statement positively, strikes and protests will be initiated, the union association has announced.

National Tripartite Committee on International Labour Standards

Two national commissions on social dialogue beyond the Labour Code framework, one for the public sector and one for the private sector, were merged in 2012 into this committee. The national commissions used to meet twice a year in April and October to discuss wages (April) and financial and budgetary policies (October).

Economic, Social and Environmental Council (CESE)⁵⁶

The CESE was established in 2011. This advisory council is not a tripartite body, as members are appointed by the public authorities or his Majesty. The council composed 116 members, of which 15 represent employers and 15 represent workers.⁵⁷ Professional organisations and associations, as well as other associations working in the field of social economy and rights, are also represented. Its aim to provide the government and the parliament with opinions, studies and proposals on the national economy and education, among others. CESE has recommended to strengthen the tripartite social dialogue, create a national model for labour protection through collective agreements.⁵⁸ It includes to propose the establishment of regional social dialogue with the participation of regional councils as a forum for collective agreements to emerge. Since the CESE has only a consultative role, its reports have neither bargaining power nor authority.

Other tripartite organs functioning in Morocco:⁵⁹

- Superior Council on the Promotion of Employment.
- Regional Council on the Promotion of Employment.
- Tripartite National Commission.
- Investigative and Conciliation National Commission.
- Investigative and Conciliation Provincial Commission.
- The Occupational Safety and Health Board.
- National Security Fund (CNSS).
- Consulting Services for MSME lending project (APEX institution).
- Office of Vocational Training and Employment Promotion (OFPPT).

Labour disputes system

The legal framework for domestic and international arbitration in Morocco has been under a modernisation process, reforming the civil procedure law from 1974 as amended by law no. 08-05 from 2007. A new draft arbitration code is currently debated by Moroccan parliament that aims at reducing court congestion and shorten the litigation process as well as to guarantee transparent and fair trials. Both the trade union movement and employers' organisations are supporting these improvements. For example, the UMT, UGTM, UNMT and CDT, on the one hand, and General Confederation of Moroccan Enterprises (CGEM), on the other, signed in 2018 an agreement setting up a joint social mediation fund to manage the impact of strike actions. The fund's functioning is challenged by difficulties in securing the independence mediators, which the CGEM and the UMT are currently working on.

The mediation process is used for litigation, especially in commercial and labour disputes. This procedure is set in the current law no. 08-05 but delivers it lacks several precise definitions. Mediation requires a neutral arbitrator who reviews documents to determine necessary actions and to what degree expert witnesses and cross-examinations are required. The arbitrator also hears arguments by counsel before rendering a decision.

Conciliation is a process for resolving disputes. The disputants conduct this process voluntarily as they freely agree to engage in negotiation in an attempt to resolve their dispute. This procedure can be coordinated by tribal leaders that can apply principles drawn from Islamic jurisprudence, communal, and cultural norms. Conciliation can also be a compulsory process in which social norms play an important role in exerting pressure on parties to end solutions to their disputes according to values and ethics. The minister of labour may appoint one or more officials to serve as conciliation officers and to carry out mediation for the settlement of collective labour disputes. If the conflict is not able to achieve a settlement between the parties, the minister shall refer the dispute to a Conciliation Board. In case this board fails to settle, the minister shall refer the dispute to the labour tribunal that set up three judges commissioned by the Judicial Council. This tribunal's decisions are binding and final to the parties of the dispute and cannot be challenged before any judicial or administrative authority. Courts have the authority to reinstate workers dismissed arbitrarily and may enforce rulings that compel employers to pay damages and back pay. It was noted that enforcement procedures were subject to lengthy delays and appeals for several years.⁶⁰

During the 2010s, the trade union movement has initiated to promote a more bipartite approach, such as a national pact on employment, decent work, and competitiveness, which was signed individually by several central organisations. They launched a proposal of bipartite social mediation at both national and regional levels. The latter initiates solved some cases concerning collective disputes but stayed managed directly by social partners rather than by mediators.

TRADE UNION RIGHTS VIOLATIONS

The legal provisions have undermined freedoms and actions of the trade unions. The Global Rights Index 2020 ranked Morocco as 3 out of 5+ (5+ is the worst ranking): workers are confronting "regular violations of rights." It concerns government and/or companies are regularly interfering in collective labour rights and/or failing to guarantee important aspects of these rights fully. There are deficiencies in labour-related legislation and certain practices which make frequent violations possible. Morocco has stayed on this ranking since 2015; in 2014, the country scored 4, characterised with systematic violations of rights.⁶¹

During the period from 2016 to 2020 (September), ITUC registered nine cases of regular violations of rights. These cases range from systematic dismissal of trade union leaders, proposed legislation to limit the right to strike, May Day demonstration broken up by law enforcement officers, repression of teacher protests, social dialogue not yet institutionalized, right to freedom of association violated at Tangier export processing zone, anti-union ruling in Agadir, anti-union repression at a steel mill, and head of dockers' union dismissed.⁶²

Several domestic non-governmental organisations (NGOs) reported that employers often used temporary contracts to discourage employees from affiliating with or organising unions. Trade unions complained about the government's use of the Penal Code to prosecute workers for striking to suppress strikes.⁶³ The government has enforced strict procedures controlling journalists' meetings with NGO representatives and political activists.

Some unions are demanding that the proposed legislation draft regulatory law No. 15-97 limiting the rights to strike should be withdrawn.⁶⁴ At the beginning of 2019, unions launched "Month of Anger" protesting against lack of social dialogue commitments from the government.⁶⁵

Around 85,000 people are living in modern slavery in Morocco, which equals an estimated prevalence of 2.4 per 1,000 population. Morocco ranks as number 121 out of 167 countries on the Global Slavery Index from 2018 (1 is the worst score).⁶⁶ This index measures modern slavery, i.e. slavery-like practices (such as debt, bondage, forced marriage and sale or exploitation of children), human trafficking and forced labour. Workers in fishing industries have a medium risk of modern slavery. In 2016, the government passed comprehensive trafficking legislation, which has resulted in improved ratings.

During 2017, the government's human rights stance came under scrutiny by international organisations, including the United Nations Human Rights Council, Universal Periodic Review (UPR). It was noted that some of the critical barriers to effective implementation include judicial oversight and accountability; progressive legislation by formal and informal justice mechanisms; police enforcement; and legal aid and information.⁶⁷

There is one follow-up case in the ILO's Committee of Freedom of Association. The case was filed in March 2013 by the Democratic Federation of Labour (FDT) that reported that the authorities' exclusion of the Democratic Union of the Judiciary (SDJ) from all collective bargaining despite it being the most representative organization in the sector. The Committee has forwarded recommendations, and the case will be followed (Table 7).

Table 7: ILO Complaints Procedure, Freedom of Association Cases in Morocco, 2019

Freedom of Association cases	Number
Active	0
Follow-up	1
Closed	67

Source: ILO, NORMLEX, International Labour Standards country profile, Freedom of Association cases, Morocco

In February 2020, there have been pro-reform protests. The demonstrations were organised by leftist parties, unions and civil organisations and gathered thousands of people on the streets in Casablanca.⁶⁸ Fear of the COVID-19 outbreak has temporarily made protests less intense during 2020.

WORKING CONDITIONS

Morocco introduced the Guaranteed Interprofessional Minimum Wage (SMIG) in the early 1980s as a means of protecting employees, increasing their purchasing

power, and guaranteeing a minimum income for Moroccan workers. It applies to both public sector and private sector workers. Tripartite social dialogue reached the latest agreement of the minimum wages to increase by 10% over the period from 2019 to 2020: in 2020, the minimum wages were set of Dirham (MAD) 3,300 (US\$343) in the public sector, MAD 2,699 (US\$281) in the private sector, and MAD 1,904 (US\$198) in the agricultural sector (see more in Table 8).⁶⁹ The minimum wages have increased in real terms (i.e. superseding the aggregated inflation in consumer prices and GDP per capita growth), which signals that workers income purchasing power has been protected: on average, yearly real minimum wage increases of 3.3% in the public sector, 0.8% in the private sector, and 1.2% in the agricultural sector. Generally, Morocco's minimum wage on average is quite high at (current) US\$274 in comparison to other Northern Africa countries, e.g. Algeria's of US\$231, Egypt of US\$123, and Tunisia of US\$142.⁷⁰

Table 8: Salaries and minimum wage in Morocco, Monthly average and minimum wage real growth

Salary / wages	Dirham Current	US\$ Current
Average salary (2018)	5,188	524
Median salary (2018)	2,723	275
Minimum wage (2020)		
Public sector	3,300	343
Private sector	2,699	281
Agricultural sector	1,904	198
Minimum wage real growth	Aggregate, 2013-2020 *	Yearly, average *
Public sector	23 %	3.3 %
Private sector	5.5 %	0.8 %
Agricultural sector	8.3 %	1.2 %

* Minimum wage deflated in aggregate inflation in consumer prices and GDP per capita growth.

Sources: National Security Fund (CNSS), Salary Explorer; DTDA estimations of growth in real minimum wage.

Based on the National Security Fund's (CNSS) affiliated 3.5 million employees, the median salary was estimated at MAD 2,723 (US\$284) in 2018. Many of the listed employees receive less than the minimum wage in practice just as many Moroccan workers are not declared to the CNSS and operating in the informal economy (see more in Informal Economy sub-section). Moreover, there is a wide disparity between the lowest and highest salaries in Morocco, e.g. there are different wage levels for urban and rural areas as well as for different age groups (see also Table 8).

The absolute poverty level threshold wage was estimated as MAD 70 (US\$7.1) per day, which was in line with the daily minimum wage in the agricultural

sector. Workers from the informal economy are not applying the minimum wage system.

The labour Code recognises three types of contracts: i) indefinite duration contracts; ii) fixed-term contracts; and iii) a type of contract for carrying out a specific task that offers only a temporary solution for unemployment. Many employers often apply temporary contracts to discourage employees from affiliating with or organising unions. In Morocco, labour regulations are strict in terms of hiring and firing procedures. Among others, it is prohibited to terminate a contract of an employee for economic reasons. Only a serious breach of the contract from the worker can allow the employer to engage in firing procedures. In practice, firing procedures are complex and costly. It has been argued that these procedures hamper labour demands and dissuade firms from investing in the human capital of their workforce by encouraging temporary contracts. On the other hand, the protective firing regulations could indirectly be interpreted as a lack of an unemployment insurance scheme.⁷¹ A brief overview of the status of working conditions in Morocco is available in Table 9.

Table 9: Status of Working Conditions in Morocco

Fixed-term contracts prohibited for permanent tasks	Yes
Maximum length of a single fixed-term contract (months)	12
Standard workday	8 hours
Premium for night work (% of hourly pay)	0 %
Premium for work overtime work (% of hourly pay)	0 %
Paid annual leave (average for working days with 1, 5 and 10 years of tenure, in working days)	20 days
Length of laid maternity leave	98 days
Percentage of wage paid during maternity leave	100%
Five fully paid days of sick leave a year	No
Unemployment protection after one year of employment	No *

* Nevertheless, the Agence Nationale de Promotion de l'Emploi et des Compétences (ANAPEC) services as well as unemployment insurance scheme (IPE) are operating (see more in Social Protection section).
Source: World Bank, *Doing Business, Labor Market Regulation and World Bank, Women, business and the law*

A total of 409 labour inspectors were registered in 2016. That equals one inspector close per 28,000 of total workers (and 13,000 of employees). ILO is concerned if the relation exceeds one inspector per 10,000 workers in industrial market economies; one inspector per 20,000 workers in transition economies; and one inspector per 40,000 workers in less developed countries.⁷² Penalties were generally not sufficient to deter violations.⁷³

WORKFORCE

Morocco is known as a tolerant, multicultural, and stable country, but it masks underlying social tensions and unequal society. It is reflected in persistent social and economic gaps: a large segment still has limited education and financial resources, or access to social protection and sanitation.⁷⁴ In 2020, the population in Morocco is estimated to have reached 35.5 million. The country's fertility rate (i.e. birth per women) fell from 6.7 in 1970 to 2.4 in 2018. It reached the annual population growth of 1.0%, and the dependency ratio has more than halved and will stay low until 2030. This trend of declining fertility rate was similar in other Northern Africa countries. The urbanisation rate was on the rise from 58% in 2010 to 63% in 2019 (see more ahead). Figure 2 shows that 27% of the population is below 14 years, and 67% is in the working-age (15-64); around 7.1% of the Moroccan population is above 65 years.

Figure 2: Population pyramid based on Age-Sex structure of the population in Morocco, 2020



Source: CIA, *The World Factbook, Morocco*

The employment-to-population ratio is estimated to be slightly higher (one percentage point) in Morocco (41%) than the North African average (40%). It is important to realise that deep gender gaps in favour of men are present in the country, both overall (45 percentage points) and for the youth (10 percentage points). Overall, the ratios in Morocco follow the regional ones (see more in Table 10; Gender and Youth sub-sections). Some of the reasons for the low employment rate in Morocco, compared to the African average, are related to the fact that relatively few women are working in the labour market as well as a large proportion of the youth are in education or unemployed.

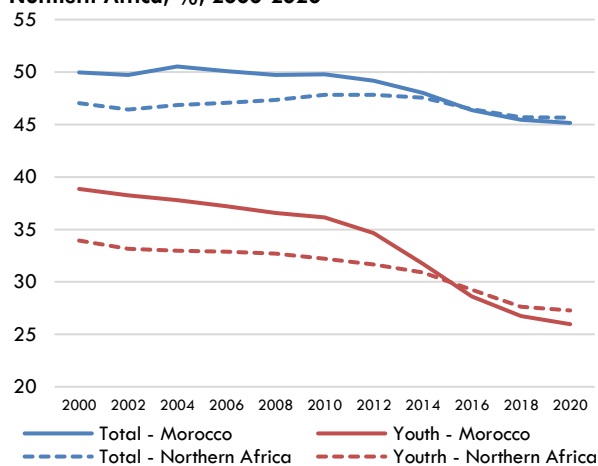
Table 10: Employment-to-population ratio, age and Sex distribution, %, 2020

Sex	Age		Morocco	Northern Africa
Total	Total	15+	41 %	40 %
	Youth	15-24	20 %	19 %
Men	Total	15+	64 %	63 %
	Youth	15-24	30 %	28 %
Women	Total	15+	19 %	18 %
	Youth	15-24	10 %	9.7 %

Sources: ILO, Key Indicators of the Labour Market (KILM)

Figure 3 shows that the labour force participation rate was dwindling, especially for the youth, during the last two decades in Morocco. These trends were in line to Northern Africa averages. Youth especially grasped the fast-growing enrolment rate on all education levels (see more in Education section).

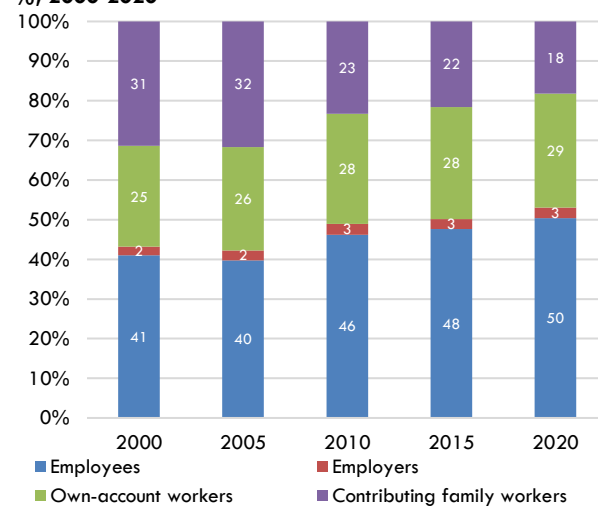
Figure 3: Labour force participation rate in Morocco and Northern Africa, %, 2000-2020



Sources: ILO, Key Indicators of the Labour Market (KILM)

ILO statistics divide the status of employment into four groups: employers, employees (paid employment jobs), own-account workers (self-employed), and contributing family workers (those who hold self-employment jobs in an establishment operated by a related person, with a too limited degree of involvement in its operation to be considered a partner).⁷⁵ As depicted in Figure 4, Morocco has experienced slight structural change in the status of employment in the 21st century. Employers continue to be the largest status of employment in the country, estimated to form half of the whole workforce. This group has increased with nine percentage points in the last two decades. Own-account workers have increased four percentage points to take up 29% in 2020. While contributing family workers almost have halved in the same period to 18%, employers continue to be the smallest employment group, forming 2.7% in 2020.

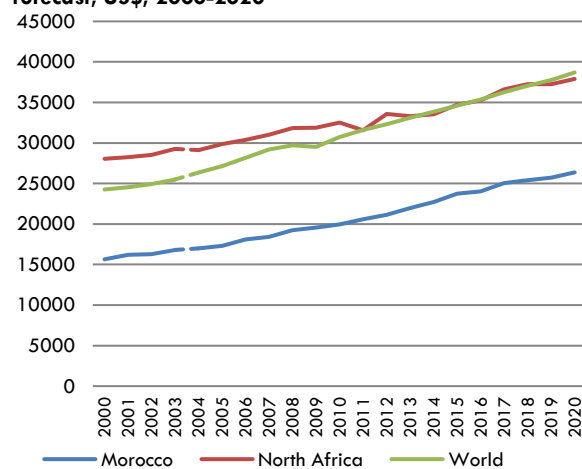
Figure 4: Estimations of status of employment in Morocco, %, 2000-2020



Sources: ILO, Key Indicators of the Labour Market (KILM)

There is a linkage in the changes in the status of employment and labour productivity. Employees are often more present in the formal sector with more access to capital, finance, and training. At the same time, own-account workers and contributing family workers often operate in more informal micro or small enterprises with low productivity activities. Thus, as part of the changes in the status of employment, Figure 5 below illustrates an upsurge of labour productivity in Morocco, but stays significantly below the Northern Africa average. Some of the reasons for the relatively low labour productivity in Morocco concern an economic and employment structural inertia, linked to a volatile agricultural sector, a poorly and weak integrated industrial and service sector (see more ahead).

Figure 5: Labour productivity trend, output per worker with forecast, US\$, 2000-2020



Note: Labour productivity is estimated as output per worker (GDP constant 2011 international \$ in PPP).

Sources: ILO, Key Indicators of the Labour Market (KILM)

In Morocco, the private sector is dominated by Micro, Small, Medium Enterprises (MSME), which represent around 95% of private businesses in all sectors and contribute 40% of GDP. Many MSMEs struggle to obtain loans, e.g. 6% of domestic micro-enterprises had access to the necessary financing as of 2017. MSMEs often loophole labour and business regulations, operating in the informal economy or simply lack awareness or incentives to join the formal sector (see more in Appendix Table 23).

Unemployment and Underemployment

Unemployment is a mounting challenge in Morocco, especially among youth. During the last two decades, the unemployment rate fell and stayed below 10% since 2006. In contrast, the youth unemployment rate was on an upsurge, hovering above 20% since 2014 (Figure 6). This situation was a result of lacking job creation to absorb the fast-growing better-educated youth population. Nevertheless, the country's unemployment rates stayed significantly lower than Northern Africa averages. In Morocco, unemployment gender gaps are moderately low. However, it is underestimated due to the fact of the women's relatively low labour force participation rate (see Table 11 below and Table 18 ahead). Morocco's Ministry of Labour predicted a loss of 712,000 jobs and an unemployment rate of 15% in 2020, up to 27% for the youth, as an impact of the COVID-19 pandemic, not to mention the average number of weekly working hours per person fell from 45 to 22 hours in the second quarter of 2020.

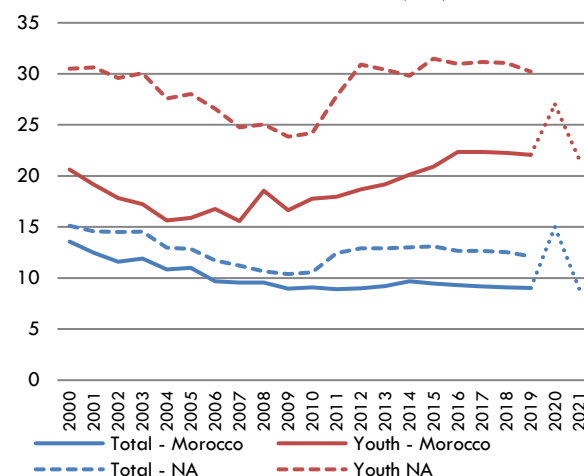
Table 11: The unemployment rate and labour utilisation in Morocco and Northern Africa, %, 2019

	Sexes	Morocco	Northern Africa
Unemployment	Total	9.0 %	12 %
	Men	8.6 %	9.1 %
	Women	10 %	22 %
Youth Unemployment (15-24 years old)	Total	22 %	30 %
	Men	22 %	26 %
	Women	23 %	40 %
Labour underutilisation *	Total	26 %	25 %
	Men	23 %	20 %
	Women	32 %	40 %
	Youth, total	43 %	50 %

* Combination of unemployed, potential labour force and time related underemployment. Time-related underemployed are defined as all persons in employment who, during a short reference period, wanted to work additional hours, whose working time in all their jobs was below a specific threshold of hours, and who were available to work additional hours if they had been given the opportunity to do so.⁷⁶

Sources: ILO, Key Indicators of the Labour Market (KILM)

Figure 6: Estimation and projections of unemployment trends in Morocco and Northern Africa (NA), %, 2000-2021



Sources: ILO, Key Indicators of the Labour Market (KILM)

Unemployment tends to root itself: 65% of the unemployed had been unemployed for over a year, and 52% were first-time jobseekers. The government launched a temporary contract programme (Contracts ANAPEC) designed to help new entrants into the job market. It included that the government paid social security and medical insurance contributions for the employee. In addition, employers were required to pay above the minimum wage and hire 60% of ANAPEC interns after the contract. However, Contracts ANAPEC fell outside the jurisdiction of the Labour Code and could thus be abused.⁷⁷

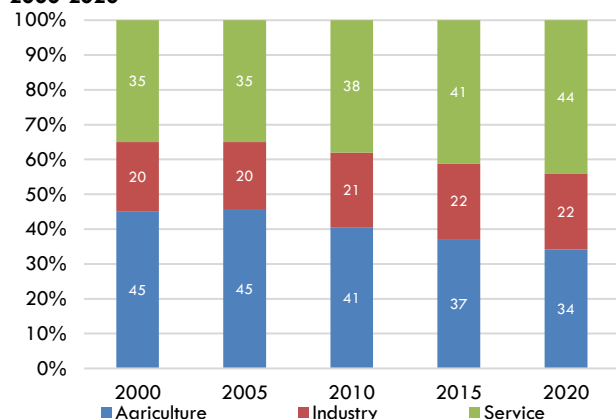
Unemployment is more prevalent among those with higher educations in Morocco compared to those with lower or no-education. Based on estimations from 2012, persons who attained secondary or tertiary level had an 18% unemployment rate while it was down to 6.8% for those with primary educated or less.⁷⁸ The latter group is more likely to be underemployed. Data show that urban underemployment is only slightly lower than in rural areas in the country. It indicates that there is hidden unemployment in the more industrialised parts of the economy. To some extent it is mirrored in the fact of non-agricultural informal employment in Morocco often is in single-person shops or services, which is an alternative to unemployment.

The 'strict' unemployment rate (i.e. everyone who does not exceed working for more than one hour per week) is shadowed by higher labour underutilisation rates, e.g. people who are willing and able to work more than they do. In 2019, the labour underutilisation rate was 26% of the employment with a ten-percentage point gender gap, and youth at 43% (Table 11 above).

Sectoral Employment

Aggregate sector employment in Morocco has gone through some structural changes from 2000 to 2020. The changes are mainly a shift from the agricultural sector to the service sector. In contrast, the industry sector only increased in the margin (see more details in Figure 7).

Figure 7: Employment by aggregate sector in Morocco, %, 2000-2020



Sources: ILO, Key Indicators of the Labour Market (KILM)

Table 12 below brings a more detailed overview of the employment per sector. Some of the main observations are that the agricultural sector remains the largest sector in terms of employment at around 3.8 million workers. Around one out of three (37%) are women in this sector; among women's share close to one out of two work in the agricultural sector.

The share of industry in total economic output was stalled and the share of the industry employment in total employment was declining in the margin. This situation is challenging the Sustainable Development Goals' target concerning the promotion of inclusive and sustainable industrialisation as well as raise the industry's share of employment and gross domestic product (see more in SDG Table, Indicator 9.2.2, on Page iv). In the industry sector, manufacturing and construction are the main contributors to the employment of 11% (1.2 million) of the employment and 10% (1.1 million), respectively. Overall, men are dominating this sectoral employment. There were some employment shifts within the industry sector during the last two decades. First, there was an upsurge in the employment share in construction by 3.9 percentage points from 2000 to 2020. In contrast, the manufacturing sector share dropped by -1.8 percentage point in the same period. It is important to realise that in the manufacturing sector women's share has been relatively high at 27% but dropped -6.4 percentage points in the mentioned period; it stayed stable for men's share. It was particularly a result of a declining

production of textiles. Studies showed that the relative decline of the manufacturing employment in Morocco was not due to slow domestic final demand for manufactures nor due to unfavourable trends in net intermediate demand for manufactures by other sectors of the economy. Instead, rapidly increasing labour productivity growth in manufacturing – especially in the mechanical, metallurgical, and electrical as well as agri-food sectors – accounted for a large share of the decline in employment share. Besides, Morocco's increasing trade deficit in manufactures furthermore played a mounting role. For example, trade with China alone accounted for more than half of the deterioration in the trade deficit in manufactures.⁷⁹

The upsurge in the service sector mainly came from a development in the trade and hotel/restaurant sector that constituted 20% (2.2 million), and it increased by 1.8 percentage points in the period from 2012 to 2020. Especially women moved towards the trade, restaurants and hotels sub-sectors. Community, social and personal services sector fell by 3.7 percentage points from 2012 to 2020. One of the reasons is the impact of economic policies that affected the public sector (see also Social Protection section).

Table 12: Employment sector distribution in Morocco, 2020

Sector	Total sector employment	Sector employment share, %	Ratio of women in sector employment, %
Agriculture	3,793,086	34 %	37 %
Mining & quarrying	77,169	0.7 %	1.7 %
Manufacturing	1,174,791	11 %	27 %
Electricity, gas & water	43,479	0.4 %	11 %
Construction	1,129,621	10 %	0.6 %
Trade, restaurants & hotels*	2,174,510	20 %	9.2 %
Transport, storage & communication	562,386	5.1 %	5.6 %
Finance, real estate & business services**	347,447	3.1 %	26 %
Community, social and personal services***	1,115,827	10 %	34 %
Other services	692,164	6.2 %	29 %
Total	11,110,481	100 %	24 %

* This sector includes: Wholesale and retail trade; repair of vehicles and motorcycles and Accommodation and food service activities. ** This sector includes: Financial and insurance activities and Real estate; business and administrative activities. *** This sector includes: Public administration and Defence; compulsory social security, Education, and Human health and social work activities.

Source: DTDA calculations based on data from the ILO, Key Indicators of the Labour Market (KILM)

Table 13 depicts the GDP share per sector and estimations of workers' value-added to GDP. On

average, the GDP share by sector per worker was estimated at US\$9,494 per year. It is introduced as a proxy indicator of sector labour productivity. It is worthwhile to mention that workers' input on the GDP only partially explains the total labour productivity since their output depends to a large degree on the use of other inputs (e.g. capital, intermediate inputs, technical, organisational and efficiency change, and economies of scale). These aspects can explain the significant divergences in the ratio of worker to GDP share. For example, the agricultural sector constituted 39% of all employment in 2011 that produced 14% of the total GDP, which equals a GDP share of US\$3,396 per workers per year. It was the lowest number among all other sectors. Several calculations reveal thought-provoking results. For example, employment in the finance sector was only 2.3% of the total employment, but it produced 17% of GDP. Mining and quarrying sector also had relatively low employment of 0.6% of total employment, but it contributed to 3.2% of GDP, which equalled US\$64,651 per worker per year. This latter sector is very capital intensive that contributed to the relatively high ratio of employment to GDP share.

Table 13: GDP share by sector and workers' value added to GDP in Morocco, 2016

Sector	GDP share by sector, %	Worker value-added to GDP, US\$
Agriculture	15%	3,889
Mining & quarrying	2.5%	35,482
Manufacturing	18%	16,424
Electricity, gas & water	2.4%	61,838
Construction	6.3%	5,964
Trade, restaurants & hotels	12%	5,877
Transport, storage & communication	6.6%	13,244
Finance, real estate & business services	17%	57,306
Community, social and personal services *	10%	9,695
Other services *	11%	17,420
Total / average	100%	9,494

Note: GDP share by sector per worker is calculated by the total GDP (current US\$) divided by GDP share per sector origin which then is divided in number of workers per sector.

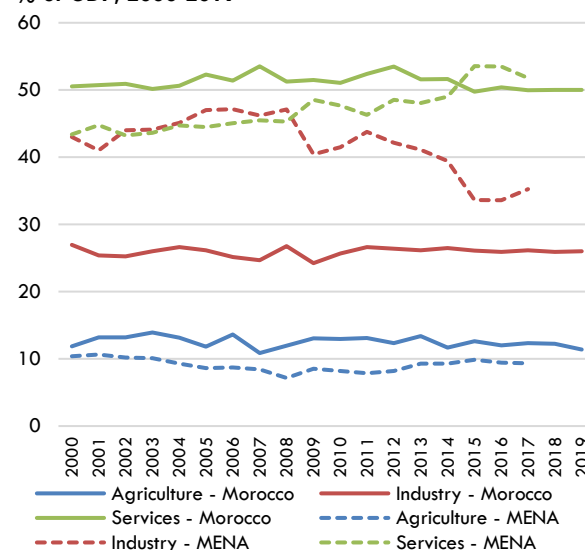
Source: DTDA calculations based on data from the World Bank DataBank, ILO, Key Indicators of the Labour Market (KILM) and AfDB, OECD & UNDP, African Economic Outlook 2016, Morocco

Despite increasing employment in the service sector in Morocco, it has not increased this sector's GDP value-added trend during the last decade (Figure 8). This position could, to some extent, be explained by a lack of

sufficient new formal jobs, growing youth unemployment and perpetual underemployment. Also, for the agriculture and industry, the GDP contributions have changed inconsiderable. In comparison, MENA had strong diverging trends between the industrial and service sector which are moving towards Morocco's rates (Figure 8).

In terms of sectoral contribution to the Gross Domestic Product (GDP), it was noted that Morocco has a significantly lower rate in the industry sector compared to the Middle East and Northern Africa (MENA) (excluding high income) average. In contrast, the agricultural and service sectors are hovering slightly above the regional average (Figure 8).

Figure 8: Sectors' value added in Morocco and the Middle East and Northern Africa (MENA) (excluding high income), % of GDP, 2000-2019



Source: World Bank, World Development Indicators

Migration

Migration flows are moving in several ways in the country: internal migration (e.g. rural-urban), net-migration (in- and out-migration), and in the form of refugees.

Rural exodus of the Moroccan population played a central role over the past 40 years. Part of this was based on economic hardship in villages intertwined into import substitution industrialisation and capital intensive in rural economic with concentration of ownership of the means of production. In 2019, 63% of the population in Morocco lived in urban areas, which is an increase of 5.5 percentage points compared to 2009.⁸⁰ By 2050, it is estimated that almost 75% of the country's population will be living in cities. Economic activities are

correspondingly concentrating in the cities (see more in Economic Performance section).⁸¹

Over the last decades, the country experienced a high out-migration flow and personnel remittance is a central part of the economy. Studies argued that almost one-third of Moroccans, especially young people, wish to emigrate.⁸² In the beginning of the 2010s, around 2.8 million Morocco-born migrants resided abroad, out of which 2.4 million were in Europe.⁸³ Table 14 illustrates the scope of the net migration flow. The negative net migration rate trend has been on a declining trend that has been part of economic pressures and cooperation on migration matters (see ahead). Besides, personnel remittance has likewise slowly declined reaching 6.2% of GDP on average from 2015 to 2019. This inflow of remitters superseded the MENA average (excluding high income)

Table 14: Status of net migration and remittance

Net migration (2013-2017)	Morocco	-257,096
Net migration rate (migrants per 1,000 persons)	Morocco	-1.284 (2020) -1.889 (2015) -3.036 (2010)
Personal remittances received, % of GDP (2015-2019, av.)	Morocco	6.2 %
	MENA *	4.5 %

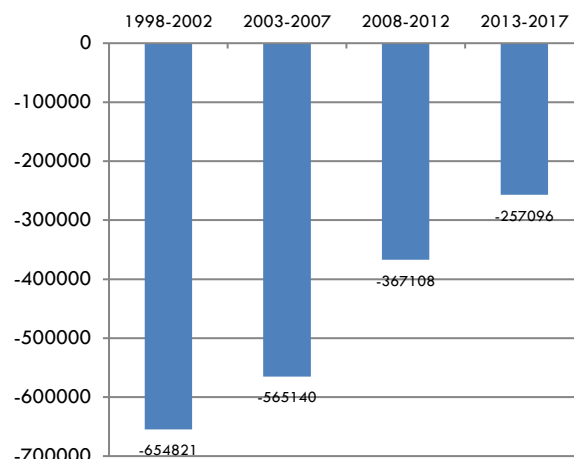
* Excluding high income countries.

Note: Net migration is the net total of migrants during a period, i.e. the total number of immigrants less the annual number of emigrants, including both citizens and non-citizens.

Source: World Bank DataBank and United Nations - World Population Prospects

As a result of the global financial crisis in 2007-2009, employment opportunities for low-skilled workers in southern European countries dried up. This situation made many Moroccans return reflected in the previously presented youth unemployment rate that has remained consistently high. In the major destination countries, a large share of Moroccan migrants, seem to be mobile and could return to Morocco. Those who choose to return to Morocco do not seem to encounter difficulties reintegrating in the Moroccan society.⁸⁴ Figure 9 depicts the net migration pattern from 1998 to 2017: more left than enter the country, but at a declining trend by more than 60% from the mentioned period. The current net migration rate for Morocco in 2020 is -1.284 per 1000 population, a 5.6% decline from 2019.

Figure 9: Net-migration trend in Morocco, 1998-2017



Note: Net migration is the net total of migrants during a period, i.e. the total number of immigrants less the annual number of emigrants, including both citizens and noncitizens.

Source: World Bank DataBank

Changes of the migration flow supported by the cooperation on migration matters and the management of migration flows between the European Union (EU) and Morocco. The return and reintegration of Moroccans in Morocco was a priority in the EU-Morocco policy cooperation. The implementation of the Mobility Partnership signed in June 2013 has translated into a more than doubling of EU resources for cooperation allocated in the field of migration in Morocco. The National Immigration and Asylum Strategy was launched in 2014, including eleven immigrant integration programmes in all relevant fields. The Department on Migration Affairs was created in 2013 within the Ministry in Charge of Moroccans Abroad and Migration Affairs (MCMREAM).

In 2019, Spain and Morocco pledged to cooperate more closely to decrease illegal migration.⁸⁵ Several campaigns to formalise undocumented immigrants has been carried out. Attempts to give migrants residency cards have been coupled with help to find employment aiming at integrating the migrants into the Moroccan society. Arguably, even if Morocco does everything it can and collaborates fully with the European Union, these actions do not reduce irregular migration to Spain significantly.⁸⁶ Without active Moroccan-Algerian cooperation, which is not the case today, Morocco's eastern border will continue to experience high migratory pressure.

The Moroccan constitution from 2011 introduced provisions regarding the non-discrimination of foreign migrants and the protection of their rights. Morocco has been an important transit country for mostly irregular

migrants from sub-Saharan Africa to Europe.⁸⁷ During the 2010s, an in-migration flow was an impact of MENA regional unrest and conflicts in other neighbouring sub-Saharan Africa countries (e.g. the conflict of 2010-2011 in the Ivory Coast, the ongoing crisis in Mali since 2012).⁸⁸ The Moroccan state tends to consider virtually all sub-Saharan immigrants in Morocco as economic migrants on their way to Europe. EU has increasingly put pressure on Morocco to limited maritime departures and secure its borders - most notably France and Spain, which are the member states most affected by this migration. Generally, many African migrants in Morocco are fleeing from the political and economic crisis at home.⁸⁹ As the Moroccan economy has grown and entry to Europe has become increasingly difficult, more African migrants have settled in Morocco, rather than continued their journey to Europe or returned to their home-countries. It furthermore supported the changing net migration flow displayed in Figure 9. An estimated 700,000 sub-Saharan African migrants reside in Morocco, mostly in cities lacking legal statuses.⁹⁰ The scope of working rights and access to social services coverage among migrant workers has been meagre, e.g. the government admitted 24,000 sub-Saharan African migrants in 2014.

The public perception of immigrants has reportedly become increasingly hostile.⁹¹ Crackdown on sub-Saharan African refugees and moved and abandoned to remote areas close to the Algerian border or in the south of the country, according to human rights organisations.⁹²

During the COVID-19 pandemic in 2020 forced most countries closing borders and issuing some form of stay-at-home orders. Safety and services dedicated to asylum seekers and refugees has dramatically decreased. Many migrants in Morocco not only faced critical health situations and increased economic insecurity, but also not benefit of state aid or insurance. In the current situation, asylum seekers, refugees, and immigrants are more vulnerable to permanent job loss and deportation as movement is restricted.

Informal Economy

The informal economy is a substantial part of Morocco's economy and employment, which is a signal of weaknesses in the application of labour and business regulations.

The government claimed that the informal economy in Morocco contributed around 12% of the GDP in 2016.⁹³ Other measurements suggested it was up to 43% of total

GDP in 2015 with an increase of 3.1 percentage points in the period from 2006 to 2015.⁹⁴ Similarly, the national survey on the Informal economy from 2013-2014 also revealed an increase in the size of informal economy by 1.2% since 2007, operated with 1.7 million informal production units (IPU) (i.e. a production unit that operates in the owner's home).⁹⁵ These measurement diverge due to different methodologies and database as well as limitation of data from the informal economy. Other estimations suggest the informal economy constitutes more than half (54%) of the GDP in the textiles and clothing industry, almost a third (32%) of GDP in road freight transport, nearly a third (31%) in construction, and more than a quarter (26%) in the food and tobacco industry.⁹⁶

Several estimations exist in terms of employment in the informal economy. Around 2.4 million workers were operating in the informal economy in the non-agricultural sectors in 2013. This segment increased by 7.1% in absolute terms from 2007. However, in relative terms, the ratio of informal employment to total non-agricultural employment was estimated to be 36%, but with a drop of 1.0 percentage point from 2007. To a certain extent, it was related to the before-mentioned increasing segment of employees. It is worthwhile to mention that many workers in the agricultural sector were subsistence and informal farmers. That could bring estimations of the ratio of informal workers to total labour force estimation up to 51%. Other approximate suggests that informal employment takes up 43% of the total workforce.⁹⁷ Another central point was that only 9% were women in informal production units (see more in Table 15).

Table 15: Status of informal economy in Morocco

Range of informal economy in total GDP (2015/16)	12% - 43%
Non-agricultural employment in informal economy (2013)	2,375,922
Women in informal production units	9 %
Ratio of informal employment to total non-agricultural employment (2013)	36 %
Ratio of informal employment to workforce, including agriculture workers (2013)	51 %

Sources: Morocco's High Commission of Planning; HuffPost, Canadian Center of Science and Education; DTDA own ratio calculations

There were some changes in the status of informal employment. First, almost one out of two (47%) of the total non-agricultural informal workers were operating in the commerce sector in 2013, and it is interesting to observe that this segment was on a significant decline. In contrast, the public, industrial and service sectors all had an increasing ratio of informal employment. Second, the industrial sector has a substantial ratio of informal

employment to non-agricultural workers of 37%. This status could support the relatively low labour productivity (see more in Table 16).

Table 16: Evolution of informal employment in non-agricultural employment in Morocco, 2007-2013

Sector	Informal employment, 2013	Percentage point change, 2007-2013	Ratio of informal employment to non-agricultural workers, 2013	Percentage point change, 2007/13
Public sector	9%	3%	22%	5%
Commerce	47%	-4%	68%	-13%
Industry	20%	-1%	37%	3%
Services	24%	3%	21%	3%

Source: Haut-Commissaire au Plan, *Présentation des résultats de l'Enquête Nationale sur le Secteur Informel 2013/2014*

The labour market-related laws become ineffectual where informal activities are predominating along with difficulty to implement labour policies. Some formal enterprises have no hesitation in using undeclared labour, either occasionally or regularly. Therefore, minimum wage requirements are often ignored.⁹⁸ It is also an impact of a weak labour inspection system. Furthermore, there were numerous tasks outsourced to undeclared micro-enterprises and small and medium-sized businesses by larger companies, making the system even more oblique. Indirect effects brought by improvements in the employment situation and as an effect of interconnection between formal enterprises and informal contractors have an influence of collective bargaining on informal enterprises.⁹⁹

Around 70% of enterprises in the country are in the informal economy.¹⁰⁰ The informal economy is dominated by small and micro units, as only one person composed almost 75% of all informal enterprises, and less than eight percent of informal units consist of more than three employers.¹⁰¹ More than one-third of informal workers had no education, while only 3.3 per cent achieved a high degree. Close to four out of five (78%) goods produced in the informal economy are consumed by households.

Regarding gender issues, informal enterprises headed by women have, on average, 1.8 employees and make down to 3.5 times smaller profit on average compared to those run by men.¹⁰² Lack of social connections, access to information and opportunities for collective action is often the case in the informal economy, especially among domestic workers. In general, employment relations in the informal economy tend to emphasise employer flexibility rather than that of the employee. The fact that the social security system is highly fragmented in Morocco

contributes to a greater informality in the labour market (see more in Social Protection section).¹⁰³

On the positive side, Morocco has a relatively high ranking on the Doing Business Index (see also Appendix Table 23). What keeps many businesses and activities informal are related to lack of awareness or incentives concerning implementing the regulations.

The informal economy struggles to cope with the lockdown caused by the coronavirus pandemic. The shutdown leaves informal workers not only with the fear of this virus but also without either work or pay.¹⁰⁴ Morocco supported the workers in the informal economy and those who lose their jobs because of Covid-19 with exceptional social aid.

Child Labour

Child labour in Morocco has experienced a declining trend during the last three decades: from 517,000 children working in 1990 to 200,000 in 2019, which covered 2.8% of children today (see Table 17).¹⁰⁵ As a proxy indicator, the children in employment was 4.6% on average among the Arab States and 27% among the African average.¹⁰⁶ Of these child labourers in Morocco, 162,000 are occupied with hazardous labour (i.e. work that interferes with schooling, is excessively difficult or performed over long hours, or takes place in a hazardous environment).

Table 17: Child labour in Morocco, age 7-17, 2019

Theme	Number	Per cent
Working children	200,000	2.8 %
Working children in hazardous tasks	119,000	1.6 %
Change in working children from 2017 to 2019		-19 %

* Percentage point.

Source: Morocco World News, *HCP Highlights Moroccan Child Labor in Numbers, 2020*

A wide range of issues is push factors to child labour: household poverty, low parental-education, social norms, lack of access to education or lack of enforcement of compulsory education, lack of access to water and electricity networks and lack of social security.¹⁰⁷ A survey from 2020 revealed that one-third (34%) of Moroccan families do not have any source of income following the suspension of activities during the lockdown during the coronavirus pandemic.¹⁰⁸ This situation is most likely to trigger an upsurge in working children during the year.

Working children in Morocco are most often employed in agriculture, but also in at times the worst forms of child labour such as forced domestic service, fishing, in textiles, light manufacturing, and carpet weaving.¹⁰⁹ Around a tenth (11%) of those performing risky tasks attend school, while 81% are school drop-outs, while 8% have never attended school (see more in Education section).

Working children is often in pastoral work. Some rural Moroccan girls, some as young as six years old, are recruited for domestic work (known as *petit bonne*) in private urban homes. This group often suffer from verbal and physical abuse, lack of access to education, and excessive working hours without regular periods of rest.¹¹⁰ Some children under twelve years old are apprentices, particularly in family-owned handicraft workshops, not to mention others operated in textile and light manufacturing. Children's working conditions are habitually substandard.

The approval of the Law on Trafficking in Human Beings and the Law on Setting up Employment Conditions of Domestic Workers have improved protections for children vulnerable to trafficking and limit the employment of children between the ages of 16 and 18 for domestic work. In 2016, Morocco endorsed a child labour law which prohibits domestic child labour for those younger than 18 years.¹¹¹ Despite established laws and regulations related to child labour, gaps exist in the legal framework to adequately protect children from the worst forms of child labour.¹¹² Although the social dialogue in efforts to tackle child labour function, the authorities did not systematically inspect workplaces or enforce sanctions against child labour. Children's safety, health conditions and wages were often substandard.¹¹³

Since 2000, Morocco has implemented several programmes that aim at improving the situation of children in Morocco, which included a focus on girls in the agricultural sector. Some of the central programmes has been the National Human Development Initiative (NHDI), the Tayssir Programme, iii) *Entraide National* (National Solidarity) health and vocational training programmes, and iv) Promise Pathways Programme.¹¹⁴ Also, the Integrated Public Policy of the Protection of Childhood 2015-2025 holds five strategic objectives: i) strengthening and reinforcing the legal framework for child protection, ii) establishment of integrated territorial mechanisms for child protection, iii) standardisation of structures and practices, iv) promotion of social protection standards, and v) implementation of reliable and standardized information systems with regular monitoring and evaluation.¹¹⁵

The National Human Development Initiative (NHDI) aiming at providing aid and support to isolated areas, especially within agriculture through the establishment of adequate infrastructure and essential services, support for small income-generating activities, especially mothers, to increase especially girls educational enrolment (see more in section Education).

The government has published information on criminal and labour law enforcement efforts, investigated and prosecuted criminal cases involving child labour violations. It supports child protection centres and continued to fund the Tayssir Conditional Cash Transfer Programme, which provides direct cash transfers to qualifying families whose children school attendance criteria – reaching more than two million students in 2018. Between 2015 and 2017, the programme successfully reduced the drop-out rate by providing financial as well as in-kind aid to almost one million families. The Ministry of Education manages the programme.

Gender

Morocco is considered one of the most liberal and progressive legal frameworks in the MENA region concerning gender equality. The 2011 Morocco constitution guarantees the rights of both women and men to education and work without prejudice. It furthermore enshrined the Personal Status Code in 2004 that secured several rights for women, including the rights to self-guardianship, divorce, and child custody. It could be interpreted as restrictions on polygamy, raised the legal age of marriage from 15 to 18, and made sexual harassment punishable by law. One of the impacts of this reform was contributed to closing the gender gaps in enrolment in school on all levels (see ahead in Figure 12). The country has furthermore ratified conventions concerning discrimination and maternity protection.¹¹⁶ Some weaknesses in the legal framework persist. For example, the prohibition on early and forced marriage may be permitted through a judicial waiver, just as women's access to key economic assets remains limited. The government started to implement policies directed to integrate women into the economy.

A point often overlooked in the labour market statistics is that company cultures have hindered the extent of women's integration and other opportunities. Albeit some modernity and social changes in Moroccan households have occurred, women are often vulnerable to forms of exploitation and repression. Traditional views frequently oppose women's attainment of economic independence

and the role of women as financial providers.¹¹⁷ It is especially the case in rural communities as men are perceived as providers and protectors of the family; women are largely perceived as care providers.

As a reflection of gender gaps' scope in the labour market is illustrated in the labour force participation rate representing 49 percentage points in 2020, which is significantly broad in comparison to Africa average of 18 percentage points. On the other hand, there were minor gender gap about the unemployment rate but shadowed by the fact of women's low participation rate associated with cultural aspects. In employment, fewer women are employees but more frequently tend to take up vulnerable employment (Table 18). On the positive side, gender gaps in access to education narrowed during the last decade (see Education section).

Table 18: Estimation on workforce key indicators gender gaps in Morocco, %, 2020

Theme	Men	Women	Gender gap, percentage point (p.p.)
Participation	70 %	21 %	+49 p.p.
Unemployment	8.6 % *	10 % *	-1.4 p.p.
Employees	54 %	40 %	+14 p.p.
Vulnerable employment	43 % **	59 % **	-16 p.p.

* Year 2019. ** Aggregate own-account workers and contributing family workers.

Source: ILO, Key Indicators of the Labour Market (KILM)

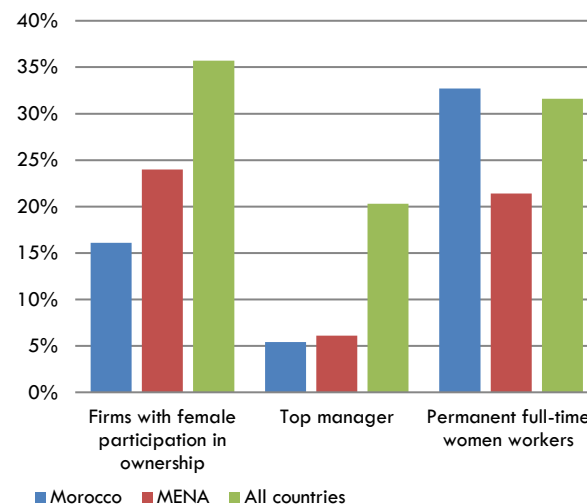
The gender gap on the labour market is also reflected by the women's average earnings that were 70% of men. Similarly, women have less formal education compared to men (see also Education section).

The larger share of subsistence farming with low productivity sectors and low-skills occupations are women in the country: around 60% of working women are employed in the agricultural sector, compared to 32% of working men. Outside of the agriculture sector, women tend to find work in manufacturing and public administration. It is worthwhile to mention that easing the access to credit for women entrepreneurs has been considered as central to creating more jobs.¹¹⁸

According to the latest enterprise survey from 2019, Morocco had a relatively high rate of firms with women's permanent full-time workers in comparison with the MENA. However, it is lower concerning their participation in ownership. Women's participation in top management is just as low as the regional average. This situation is primarily related to the company cultures previously mentioned. Although a directive to promote women to higher-level positions in public office has been put in

place, these measures have so far not had any real impact on the reality on the ground (Figure 10).

Figure 10: Enterprise Survey in Morocco, Women participation in ownership, top management, and as full-time workers, %, 2019



Source: World Bank, Morocco Enterprise Survey, 2019

The Global Gender Gap Index 2020 – measuring gaps and women's empowerment – ranked Morocco as number 143 out of 153 countries (1 is best). On educational attainment (115), Morocco scores least bad, while lowest scoring is in economic participation and opportunity (146).¹¹⁹ The whole MENA region scores lowest among all regions in the world. The other international Gender Inequality Index – measuring health, empowerment, and economic status – ranked the nation within medium human development as number 119 out of 151 countries in 2017 (1 is best).¹²⁰

Barriers to women's integration to the labour market in Morocco include high dependency on mostly unpaid family work, gender-based roles, reduced access to education and financial services along with patriarchal norms.¹²¹ Women addressing their under-representation among social partners and the promotion of gender equality through collective bargaining has been observed as a critical issue. Some steps were taken. For example, nearly 1,000 agriculture workers celebrated the first bargaining pact in 2015.¹²² However, several additional steps required to curb the gender gaps more broadly.

Youth

Young people aged 15-24 make up to 17% of the population in Morocco. The job market is gaining 240,000 new entrants each year. Only 129,000 new jobs are created, not to mention the high levels of

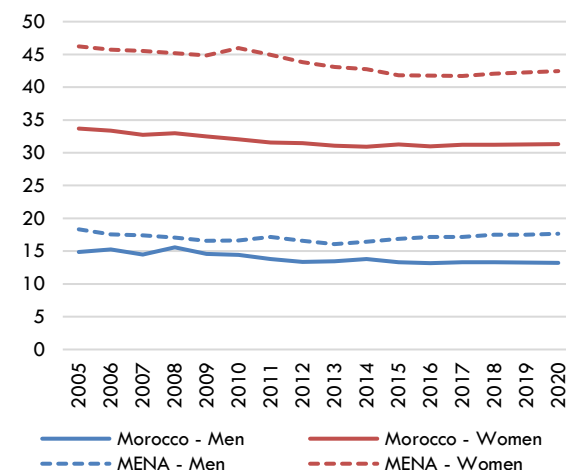
exclusion are elevated: 49% of Moroccan youth are neither in school nor in employment. Even many people over the age of 30 still live with their family, even if they have a job.¹²³ Those young men and women that have a job are often working without job security or benefits, e.g. 88% of the employed youth work without a contract. It suggests that most have activities in the informal economy with underemployment, and temporary or part-time under poor working conditions.

Young men have a significantly higher labour force participation rate than young women: 30% and 10%, respectively. It is like the Northern Africa average. The jobless growth in the country left particularly young people behind as a lost generation. The economic downturn triggered by the COVID-19 pandemic in 2020 hit youth harder, which is echoed in a potential accelerating youth unemployment rate reaching a projected 27% in 2020. Moreover, there was a disruption of education, especially those living offline in rural areas. On the other hand, media showed that young Moroccan entrepreneurs were active in fighting COVID-19, supported to producing face masks, distributing food packages and hand sanitisers, and raising awareness through social media and volunteering.¹²⁴

Unemployment has been highest for the youth in urban areas, which stood at 35% for men and almost 50% for women. While the youth unemployment rates in rural areas are lower, many young rural workers are exposed to poorer working conditions, including a lack of social protection and lower pay, compared to their urban counterparts. The lower unemployment rates in rural areas are linked to the fact that it is simply not an economically viable option and enrolled in the agriculture sector that is marred by low-productivity jobs.¹²⁵

The proportion of youth not in employment, education, or training (i.e. NEET rate) is relatively low for young men (13%) while it is significantly higher for young women (31%). These numbers are lower than the regional average (Figure 11). This NEET concept is associated with its assumed potential to address a broad array of vulnerabilities among youth, touching on issues of unemployment, early school leaving and labour market discouragement. These are all issues that warrant more considerable attention as young people continue to feel the aftermath of the economic crisis, particularly in advanced economies.

Figure 11: NEET share in Morocco, %, 2005-2020



Sources: ILO, Key Indicators of the Labour Market (KILM)

Survey data suggest that Morocco's youth enjoy a relatively good health, but education and economic opportunity could benefit for continued investment. The country is located close to the median for citizen participation (i.e. volunteer activity), economic opportunity, education, and gender equality, according to the Global Youth Wellbeing Index. As a result, Egypt ranked 16th for overall youth wellbeing out of 29 varying countries.¹²⁶ The Moroccan youth population is interested in communication and information technologies. A study argued that for 95% of youth in the cities, the internet is the main occupation of their free time, at home or in cyber cafes.¹²⁷ While the older generations still have confidence in the country's institutions, younger Moroccans are frustrated with the lack of economic and political opportunities.¹²⁸ Besides, the country runs several programmes targeting the youth, including the Economic Inclusion of Youth financing training for lower-skilled youth.¹²⁹

EDUCATION

In Morocco, education is free and compulsory for nine years for children between nine and 16 years of age. Enrolment in education was on the rise at all levels, and the gender gap was curbed. The literacy rate increased from 52% in 2004 to 74% in 2018. Based on the limitation of data availability, government expenditure on education was at 5.3% of GDP in Morocco, which slightly above the MENA (excluding high income) at 4.5%.

Among the Moroccan population above the age of 25, half have never been to school, giving Morocco low average years of schooling compared to MENA average.¹³⁰ Among others, a large segment of the

employment worked as subsistence farmers in an underdeveloped agricultural sector (revisit Figure 7). In the last two decades, school enrolment progressed into secondary and tertiary education. Higher education is not a straightforward path to better jobs, which is exemplified in the relatively high youth unemployment rate and widespread informality.

A large chunk (33%) of the employed population have less than a basic educational level. Women are overall less educated compared to men: 31 percentage points for less than basic level and 27 percentage points at the basic level (see more details in Table 19). Compared to Tunisia and Algeria, the employed population in Morocco is less educated.

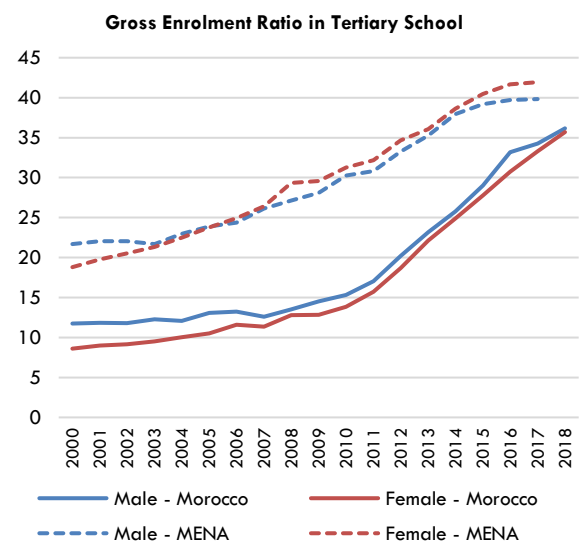
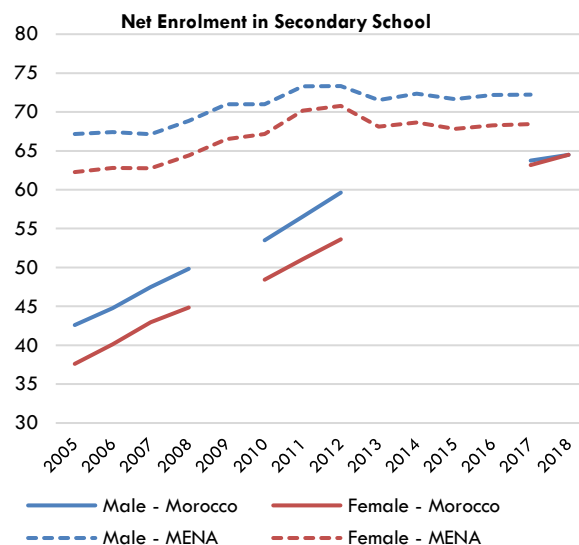
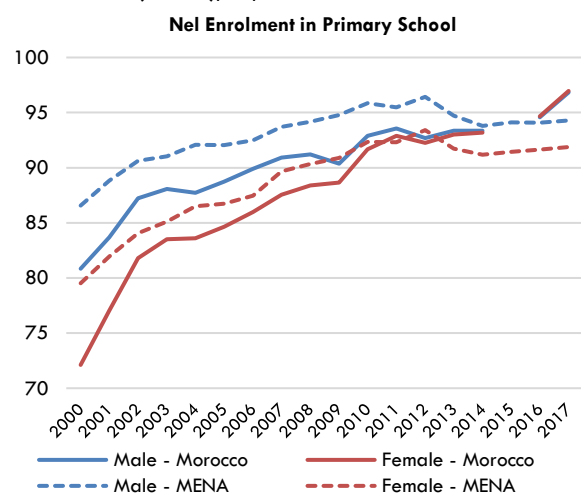
Table 19: Employment by education in Morocco, % of employment distribution, age 15+, 2012

	Less than basic	Basic	Intermediate	Advanced
Total	33 %	43 %	19 %	5.3 %
Men	25 %	50 %	19 %	6.4 %
Women	56 %	23 %	18 %	2.3 %

Source: ILO, Key Indicators of the Labour Market (KILM)

A comprehensive reform for the Moroccan education system was launched in November 2014, known as Vision 2030. It aims to restructure higher education by grouping prominent universities to increase their visibility across the region. It supported the fact of almost reaching the full net enrolment on primary school with no gender gap in Morocco and superseding the MENA average. Also, the enrolments in secondary and tertiary schooling are on a significant upsurge, but here they remain lower compared to the MENA region (Figure 12).

Figure 12: Enrolment in Primary, Secondary and Tertiary schools, male and female, Morocco and Middle East and North Africa (MENA), %, 2000-2017



Note: Net enrolment is the ratio of children of official school age, who are enrolled in school to the population of the corresponding official school age. Gross enrolment is the ratio of total enrolment, regardless of age, to the population of the corresponding official school age.

Source: World Bank, Education Indicators

Moroccan employers have preferred hiring educated students from private schools, related to tax incentives. It raised concerns affecting the public-school system and its linkage to the private sector demands. As a part of a global privatisation trend, a higher level of stratification has manifested in the Moroccan three-tier educational system.¹³¹ In August 2019, the parliament passed a bill aiming at restructuring the entire primary education system promoting socio-economic equality and social inclusion.¹³² This bill is controversial based on criticism from unions and conservative circles, which includes making French mandatory as the language of instruction for science classes.¹³³ Generally, the proposal places greater emphasis on French throughout primary and secondary school. Students from families with enough money to afford private French lessons are given

an advantage over those who cannot, which constitute most Moroccan students.

The education system faces difficulties concerning its quality. Among others, most schools often lack enough computers and internet access. The system generally lacks resources.¹³⁴ Moreover, drop-out remains high. Only 53% of students enrolled in lower secondary education (i.e. second and final phase of basic education) continue to high school; less than 15% of first-grade students are likely to graduate from high school. Low levels of daily attendance, teacher absenteeism and a poor quality of teachers' training, and a multi-lingual environment at school contribute to the relatively low literacy rates in Morocco. Those unable to complete a high school education have far fewer employment opportunities.¹³⁵ Other challenges for the educational system are overcrowding in public universities, low-quality instruction in non-competitive college majors, and a mismatch between tertiary training and the skills needed in the labour market.

Vocational Training

As part of the high influx of pupils in the education system, the number of students in vocational training increased by 68% during the 2010s, reaching 246,200 pupils in 2018. Other data from the Vocational Training office suggested that vocational training in Morocco involves approximately 370,000 students and 7,400 teachers, which is related to vocational training centres offer non-formal training beyond the formal educational system under the Ministry of Education.¹³⁶ One out of three (34%) pupils in vocational training is woman and slightly lower than the MENA regional average (see more details in Table 20 and Figure 13).

Table 20: Status and trends on vocational training in Morocco and MENA (excluding high income), 2010-2018

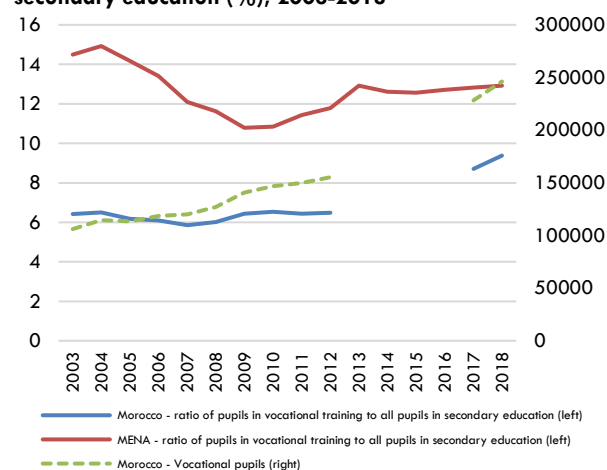
Morocco	2010	2018	Change, 2010-18
Enrolment in secondary vocational training, total	146,805	246,199	68 %
Teachers in secondary vocational education	5,082 (2004)	13,889	173 %
Teachers per pupils	1:23 (2004)	1:18	-
Comparative estimations	Country/region	2018	Change, 2010-18
Secondary education, vocational pupils (% women)	Morocco	34 %	-4.4 p.p.*
	MENA	38 %	-2.0 p.p.*
Share of pupils in vocational training to all pupils in secondary education	Morocco	8.6 %	2.8 p.p.*
	MENA	12 %	2.0 p.p.*

* Percentage Point – p.p.

Sources: World Bank, Education Statistics

As depicted in Figure 13, the ratio of pupils in vocational training for all pupils in secondary education has increased significantly during the 2010s, and slowly curbing the gap between the MENA (excluding high income) average.

Figure 13: Number of vocational training students and relatively ratios of vocational training to all pupils in secondary education (%), 2003-2018



Source: Office of Vocational Training and Employment Promotion, Indicators

The foremost vocational training institution in Morocco is the public Office of Vocational Training and Employment Promotion (OFPPT). It offers vocational training free of charge. The institution operates with an extensive network of 336 training centres all over the country. It provides diversified services: young and adult training, intra-company training, seminars and technical training courses, training through mobile units, distance-learning, intensive adult training, employees functional literacy and evening classes. Data from OFPPT shows that both the number of trainees and the network of institutions grew fast since 2006. Especially the opening of 27 training centres between 2015 to 2018 boosted vocational training. Morocco's government has prioritised vocational training and recently released US\$373 million to train young Moroccans to prepare them for the labour market. Agriculture and industry are major sectors in Morocco and targeted in several training programmes, which include planned programmes for shipbuilding.

Data suggest that the ratio of vocational teachers to pupils fell during the last two decades from 1:23 in 2004 to 1:18 in 2018 (Table 20). It signals that the education system is keeping the pace of introducing teachers to support the upsurge of vocational trainees and raises the possibility of improving the education's quality. This ratio rests higher than Egypt's that is down to 1:14 in 2018 (data from other Northern Africa countries are scarce).

The high youth unemployment rate is not only a result of insufficient job creation but also by educational mismatches. Although the situation seems relatively better for technicians and specialised technicians than the other secondary and tertiary levels, vocational training graduates often face challenges of integration on the labour market. For example, employers have asserted that the right skills are lacking in the labour market and that this is a major barrier to expanding the business, and therefore hire new workers.¹³⁷

In Morocco, firms offering formal training (i.e. firms offering formal training programmes for their permanent, full-time employees) was estimated at 36% in 2019, which was an increase by 12 percentage points since 2007.¹³⁸ This formal training rate was significantly higher than Tunisia of 29%, Algeria of 17%, and Egypt of 10%.

Morocco announced the Cities of Trades and Competences programme to promote TVET and build the capacities of young people working in the informal economy. It is planned that the programme will be launched at the beginning of 2021.

SOCIAL PROTECTION

The social protection system is evolving in Morocco but challenged by the relatively low coverage of fragmented social protection programmes. Data revealed deep coverage gaps in diverse social protection aspects, which is part of the widespread informal economy. The coverage of insurance and health assistance scheme was on the rise from 18% in 2005 to 62% in 2018; and targeted to more than 80% by 2023.¹³⁹ The universal legal health protection coverage was estimated at 42%, which was significantly lower than Algeria of 85%, Tunisia of 80%, and Egypt of 51% (see more details in Table 21).

Table 21: Social protection coverage in Morocco, latest year available

Themes	Coverage
Coverage of social protection and labour programmes (2009)	41 %
Coverage of social safety net programmes (2009)	37 %
Persons above retirement age receiving a pension (Contingency) (2009)	40 %
Estimate of legal employment injury coverage (2007)	40 %
Universal legal health protection coverage (% of population) (2007)	42 %

Source: ILO, *SDG labour market indicators*, ILO, *Social Protection, Report 2017-2019* and World Bank, *World Development Indicators*

Subsidies have been an essential part of the social protection system for decades. Since the 1980s, the government gradually liberalised prices of several subsidised products. Among food products, only a few remained subsidised in the 2010s. The subsidies on petroleum products turned into an escalated fiscal burden on the public finances in beginning the 2010s because of the rising international prices of petroleum. The subsidies reached 6.5% of GDP by 2012, with the bulk (70%) going to petroleum products. This system was furthermore not achieving its intended objectives, e.g. around 75% of energy subsidies were going to the wealthiest 20% of the population. In 2014, the government entirely removed subsidies for gasoline and fuel oil, followed by diesel. It succeeded to curb the budget imbalance.¹⁴⁰ Reforms of other subsidies, which were more sensible for the more vulnerable population, were delayed. As of January 2015, subsidies were only limited to flour, sugar, electricity, water, and liquefied petroleum gas (LPG). The elimination of the pending subsidies could curb the fiscal imbalances, but it could cost a significant increase in poverty.

In 2020, the government launched an ambitious goal to accelerate an expanding of social welfare protection to all its citizens within five years through a gradual approach. The first phase (2021-2023) focusing on the generalisation of mandatory health insurance and family allowances, followed by a second phase (2024-2025) to enlist citizens in pension funds and launch unemployment benefits. The Ministry of Economy and Finance announced in September 2020 that the finance bill of 2021 includes the objective of generalisation of social protection to allow the self-employed to benefit from family allowance, and on a later stage, the retirement and compensation for loss of employment. However, to reach that goal requires an updated legal framework, upgrading health infrastructure, and the launch of the unified social registry interlinked to tax reform.

An estimation of legal coverage for old age was 30% of the working-age population in Morocco, and there was no contribution concerning financing from the government. This coverage was in line to Tunisia's rate at 43%; for Egypt and Algeria, it was up to 100%. Based on the limitations of data availability, the Moroccan persons above retirement age receiving a pension increased by ten percentage points from 2000 to 2009, reaching 40%. A controversial pension reform bill from 2016 was approved. It included an increase in the retirement age to 63 by 2022 and raised workers' contributions from 10% to 14% by 2019. Disagreements

of the reform triggered many protests among workers.¹⁴¹

The social protection system consists of four separate national schemes, eight mutual societies and private schemes, and one voluntary scheme run by employers. There are around 140 insurance or social assistance programmes, ranging from universal transfers (e.g. flour, sugar, and butane gas subsidies) to protective mechanisms targeting specific population groups. The coordination of the programmes and stakeholders are highly fragmented due to a lack of coordination and targeting system.¹⁴² An overhaul reform of the social protection registration system currently is in progress.

Basic contributory social protection mechanisms in Morocco is divided into the public and private sector. Concerning social insurance, the *Caisse Marocain de Retraites* (CMR) operates in the public sector with two separate but broadly similar schemes for civil and military employees in the public sector. In addition, *Régime Collectif d'Allocation de Retraite* (RCAR) supports irregular public sector employees and employees of public agencies. All schemes provide old-age pensions, disability benefits, survivors' benefits, and family benefits. In the private sector, *Caisse Nationale de Sécurité Sociale* (CNSS) delivers two different schemes depending on employment status: i) Employees – old-age pensions, disability benefits, survivors' benefits, family benefits, sickness benefits, maternity benefits, unemployment benefits, and ii) Self-employed – old-age pensions and survivors' benefits. CNSS provides retirement benefits for around 24% of the economically active urban population; all the funds together provide pensions for about 2 million people, only 26% of the larger economically active population.¹⁴³

Regarding health insurance, *Assurance Maladie Obligatoire* (AMO) sets the framework covering public and private sector employees and their families. This system is managed by *Caisse Marocaine de l'Assurance Maladie* (CMAM). The contribution rates and co-payments differ for public and private sector workers. It is based on an employer-based plan linked to compulsory health insurance. CMAM supports the public sector workers and their families, students, and certain other specific categories. CNSS mentioned above provides separate schemes for employees and self-employed but with the same benefits package.¹⁴⁴ In the latter scheme, patients are eligible to have 70% of the cost of their private health care treatment and 80% of the cost of their public treatment reimbursed. Furthermore, it was extended to higher education

students in 2016, but meagre results led the government to issue a new decree in August 2018. Around 9 million Moroccans received health coverage from the scheme as of the end of 2017.

Régime d'Assistance Médicale (RAMED) is another scheme geared to cover for low-income Moroccans, such as those working in the informal economy. As of September 2018, around 12 million citizens were covered by RAMED. A third government-backed scheme covers members of the Moroccan armed forces.¹⁴⁵ Two smaller programmes operate, i.e. RCAR for local state employees and temporary workers, and the *Caisse Marocaine de Retraite* (CMR) that administers several non-contributory pension schemes.¹⁴⁶

The government undertook a series of initiatives that supported the labour market. First, the National Agency for the Promotion of Employment and Skills (ANAPEC) presented its 2020 Vision in 2015 to expand the agency's coverage to include unqualified job seekers. The agency launched three active labour programmes on wage subsidies for unemployed graduates, youth training, and entrepreneurship promotion through training and financial assistance. Besides, relevant ministries embarked on three strategies: i) youth integration, which plans to improve the training system and integrate youth into the labour market through internship or skill matching; ii) employment, which aims to increase employment and productivity; and iii) microenterprise promotion, which intends to support microenterprise financing.¹⁴⁷

After many years of negotiations between the government, trade unions, and employers, the Job Loss Allowance Code (IPE) was launched in December 2014. It was the first-ever unemployment insurance scheme in the country. This scheme is directed for workers in the private sector and apprentices in industry, commerce, agriculture and specific categories of workers in the fishing sector.¹⁴⁸ IPE supports 70% of a worker's declared average monthly wage over the 36 months before the date when they lost their job. The amount cannot exceed the statutory minimum wage. The access conditions are strict, and the scheme covers only a few of those who lose their jobs. Initially, the programme demonstrated modest results in its scope: taking into consideration the high youth unemployment rate at 21% (381,000 persons) in 2015, just 4,945 Moroccans received unemployment benefits in that year, which equalled 1.3% of total youth unemployment.¹⁴⁹ A health insurance scheme for self-employed workers, which was

also the first of its kind in the country, was legally established in June 2017.

The development of the health sector is guided by the Health Sector Strategy 2017-2021. Among others, it aims at expanding medical coverage to include individuals who are self-employed, increasing the number of employees in the health sector, as well as lowering the price of pharmaceuticals. The upcoming new health strategy point towards to the expansion of the public hospital network and the development of mobile health care services in rural areas, not to mention efforts to address a shortfall in human resources in the sector, among others.¹⁵⁰ Health expenditure has been stable at around 5.7% of GDP on average from 2010 to 2016, which was slightly lower than Tunisia and Algeria averages, 6.6% and 6.1%, respectively; but higher than Egypt's at 4.5% (see more details in Table 22).

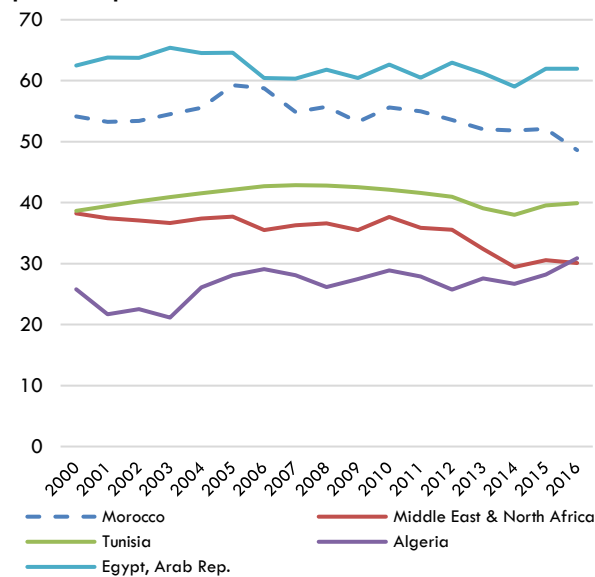
Table 22: Expenditure of health and social protection benefit schemes, % of GDP, latest year available

Service	Expenditure
Current health expenditure (2016)	5.8 %
Public social protection (excluding health)	4.5 %
Public social protection (Excluding health) for persons above statutory pensionable age	3.0 %
Public social protection (Excluding health) on people of working age	1.5 %

Source: World Bank, World Development Indicators, and ILO, Social Protection, Statistics and indicators

Health expenditure per capita in Morocco was estimated at US\$172 (current) on average from 2010 to 2016, which was lower than Tunisia and Algeria averages, US\$271 and US\$298, respectively; it is higher than Egypt's at US\$137. Out-of-pocket health expenditure accounted for 49% of total current health expenditure in Morocco, down from a peak of 59% in 2005. This drop was an impact of rising levels of coverage by state-backed insurance schemes. The still relatively high out-of-pocket health expenditure represents a heavy burden for households and exposes them to impoverishing spending. Morocco's rate is high by regional levels, e.g. standing at 40% in Tunisia and 31% in Algeria (see more details in Figure 14).

Figure 14: Total Out-of-pocket health expenditure, % of private expenditure on health, 2000-2016



Note: Out of pocket expenditure is any direct outlay by households, including gratuities and in-kind payments, to health practitioners and suppliers of pharmaceuticals, therapeutic appliances, and other goods and services whose primary intent is to contribute to the restoration or enhancement of the health status of individuals or population groups. It is a part of private health expenditure.

Source: World Bank DataBank

The Government declared a state of health emergency on March 20, 2020, just when the country had ten COVID-19 cases. This sanitary state of emergency was extended until May 20, 2020. It became compulsory to wear a mask outside as part of a national lockdown. It includes temporary closure of airports, schools, mosques, cafés, and shops, with the exemption of food markets.¹⁵¹ Large gatherings were temporarily prohibited, and social distancing was encouraged. Failure to comply is now punishable by sentences between one to three months' imprisonment, as well as fines ranging from 300 to 1,300 dirhams (US\$31 to 131). This crisis has increased public trust in the government but raised concerns about the effectiveness of the healthcare system.¹⁵² In late April 2020, Morocco was among the worst-hit African countries by the COVID-19 pandemic.

In August 2020, Morocco's National Fund for Social Welfare Organizations (CNOPS) decided to make medical expenses related to COVID-19 reimbursable. They announced reactivating compensation across Morocco for medical expenses related to COVID-19.

APPENDIX: ADDITIONAL DATA

Table 23: Ease of Doing Business in Morocco, 2020

Topics	2019	2020	Changes
Overall	60	53	+7
Starting a Business	34	43	-9
Dealing with Construction Permits	18	16	+2
Getting Electricity	59	34	+25
Registering Property	68	81	-13
Getting Credit	112	119	-7
Protecting Minority Investors	64	37	+27
Paying Taxes	25	24	+1
Trading Across Borders	62	58	+4
Enforcing Contracts	68	60	+8
Resolving Insolvency	71	73	-2

Note: Doing Business 2019-2020 indicators are ranking from 1 (top) to 190 (bottom) among other countries. The rankings tell much about the business environment, but do not measure all aspects of the business surroundings that matter to firms and investors that affect the competitiveness of the economy. Still, a high ranking does mean that the government has created a regulatory environment conducive to operating a business.

Source: World Bank & IFC, Ease of Doing Business 2020 in Morocco

Table 24: List of approved labour related legislations in Morocco, 2015-2019

Type of legislation	Legislation
2015	
General provisions	Loi n° 86-14 du 20 mai 2015 modifiant et complétant certaines dispositions du Code de procédure pénale relatives à la lutte contre le terrorisme
	Loi n° 114-13 du 19 février 2015 relative au statut de l'auto-entrepreneur
Freedom of association, collective bargaining and industrial relations	Loi n° 24-15 du 4 août 2015 relative aux chambres professionnelles
Equality of opportunity and treatment	Loi n° 125-12 du 4 août 2015 portant approbation du Protocole facultatif à la Convention sur l'élimination de toutes les formes de discrimination à l'égard des femmes, adopté à New York le 6 octobre 1999 par l'Assemblée générale des Nations Unies
	Avis du Conseil économique, social et environnemental sur la promotion de l'égalité entre les femmes et les hommes dans la vie économique, sociale, culturelle et politique
Education, vocational guidance and training	Loi n° 101-14 du 19 février 2015 modifiant et complétant le dahir portant loi n° 1-93-16 du 23 mars 1993 fixant les mesures d'encouragement aux entreprises organisant des stages au profit des titulaires de certains diplômes en vue de leur formation-insertion
Social security (general standards)	Décret n° 2-15-657 du 3 septembre 2015 pris pour l'application de la loi n° 116-12 relative au régime de l'assurance maladie obligatoire de base des étudiants
	Loi n° 116-12 du 4 août 2015 relative au régime de l'assurance maladie obligatoire de base des étudiants
Specific categories of workers	Loi n° 33-13 du 1er juillet 2015 relative aux mines
	Loi n° 27-13 du 9 juin 2015 relative aux carrières
2016	
General provisions	Loi n° 88-33 du 10 août 2016 relative à la presse et à l'édition
	Loi n° 75-13 du 18 juillet 2016 modifiant et complétant certaines dispositions du Code pénal
	Loi organique n° 100-13 du 24 mars 2016 relative au Conseil supérieur du pouvoir judiciaire.
	Loi organique n° 106-13 du 24 mars 2016 portant statut des magistrats
	Loi n° 102-15 du 12 janvier 2016 modifiant de l'article 16 de la loi n° 70-03 portant Code de la famille
Elimination of forced labour	Loi n° 27-14 du 25 août 2016 relative à la lutte contre la traite des êtres humains

Equality of opportunity and treatment	Loi 84-16 du 25 août 2016 portant approbation du Statut de l'Organisation pour le développement de la Femme dans les Etats membres de l'O.C.I. Loi-cadre n° 97-13 du 27 avril 2016 relative à la protection et à la promotion des personnes en situation de handicap.
Labour administration	Décret n° 2-16-533 du 3 août 2016 fixant les attributions et l'organisation du ministère de l'Industrie, du Commerce, de l'Investissement et de l'Economie numérique Loi 78-14 du 20 juillet 2016 relative au Conseil consultatif de la famille et de l'enfance.
Social security (general standards)	Loi n° 96-15 du 20 août 2016 modifiant et complétant la loi n° 1-77-216 du 4 octobre 1977 instituant un régime collectif d'allocation de retraite.
Seafarers	Loi n° 46-12 du 27 avril 2016 modifiant et complétant l'annexe I du dahir du 31 mars 1919 formant Code de commerce maritime
Specific categories of workers &	Loi n° 72-14 du 20 août 2016 fixant la limite d'âge des fonctionnaires et personnels affiliés au régime de pensions civiles Loi n° 19-12 du 10 août 2016 fixant les conditions de travail et d'emploi des travailleuses et travailleurs domestiques.
Domestic workers	Loi n° 19-12 du 10 août 2016 fixant les conditions de travail et d'emploi des travailleuses et travailleurs domestiques
2017	
Equality of opportunity and treatment	Décret n° 2-17-190 du 5 mai 2017 relatif aux attributions du ministre d'Etat chargé des Droits de l'Homme. Loi n° 79-14 du 21 décembre 2017 relative à l'Autorité pour la parité et la lutte contre toutes formes de discrimination.
Labour administration	Décret n° 2-17-350 du 7 juillet 2017 modifiant et complétant le décret n° 2-16-533 du 3 août 2016 fixant les attributions et l'organisation du ministère de l'Industrie, du Commerce, de l'Investissement et de l'Economie numérique Décret n° 2-17-12 du 11 janvier 2017 modifiant le décret n° 2-16-533 du 3 août 2016 fixant les attributions et l'organisation du ministère de l'Industrie, du Commerce, de l'Investissement et de l'Economie numérique
Cooperatives	Loi n° 74-16 du 10 août 2017 modifiant la loi n° 112-12 relative aux coopératives.
Social security (general standards)	Loi n° 99-15 du 5 décembre 2017 instituant un régime de pensions pour les catégories des professionnels, des travailleurs indépendants et des personnes non salariées exerçant une activité libérale. Loi organique n° 98-15 du 23 juin 2017 relative au régime de l'assurance maladie obligatoire de base pour les catégories des professionnels, des travailleurs indépendants et des personnes non salariées exerçant une activité libérale.
Specific categories of workers	Décret n° 2-17-356 du 27 septembre 2017 complétant la liste des travaux dans lesquels il est interdit d'employer les travailleuses et travailleurs domestiques âgés entre 16 à 18 ans. Décret n° 2-17-355 du 31 août 2017 fixant le modèle du contrat de travail de la travailleuse ou du travailleur domestique.
Domestic workers	Décret n° 2-17-356 du 27 septembre 2017 complétant la liste des travaux dans lesquels il est interdit d'employer les travailleuses et travailleurs domestiques âgés entre 16 à 18 ans. Décret n° 2-17-355 du 31 août 2017 fixant le modèle du contrat de travail de la travailleuse ou du travailleur domestique.
2018	
General provisions	Décret n° 2-17-618 du 26 décembre 2018 portant Charte nationale de la déconcentration administrative. Décret n° 2-17-740 du 6 juillet 2018 fixant la composition et les modalités de de la Commission nationale chargée de la coordination des mesures ayant pour but la lutte et la prévention des êtres humains. Loi n° 73-17 du 19 avril 2018 abrogeant et remplaçant le Titre V de la loi n° 15-95 formant Code de commerce relatif aux difficultés de l'entreprise. Loi n° 76-15 du 22 février 2018 relative à la réorganisation du Conseil national des droits de l'Homme. Loi n° 31-13 du 22 février 2018 relative au droit d'accès à l'information. Loi n° 54-17 du 22 février 2018 modifiant l'article 15 de la loi n° 15-95 formant Code de commerce.
Freedom of association, collective bargaining and industrial relations	Loi n° 64-18 du 6 août 2018 portant abrogation des articles 10 (alinéa 3) et 22 de la loi n° 18-09 formant statut des chambres d'artisanat. Loi n° 65-18 du 6 août 2018 modifiant l'article 30 de la loi n° 38-12 portant statut des chambres de commerce, d'industrie et de services. Loi n° 66-18 du 6 août 2018 portant abrogation de l'article 6 de la loi n° 4-97 formant statut des chambres des pêches maritimes. Loi n° 67-18 du 6 août 2018 modifiant l'alinéa 5 de l'article 10 et abrogeant les articles 27 et 33 de la loi n° 27-08 portant statut des chambres d'agriculture.

Elimination of child labour, protection of children and young persons	Loi n° 89-15 du 2 janvier 2018 relative au Conseil consultatif pour la jeunesse et l'action associative.
Equality of opportunity and treatment	Loi n° 103-13 du 22 février 2018 relative à la lutte contre les violences faites aux femmes.
Education, vocational guidance and training	Loi n° 60-17 du 5 octobre 2018 relative à l'organisation de la formation continue au profit des salariés du secteur privé, de certaines catégories de personnels des établissements et entreprises publics et d'autres personnes non-salariées qui exercent une activité privée.
Occupational safety and health	Arrêté du ministre du travail et de l'insertion professionnelle n° 1280-18 du 15 mars 2018 fixant les conditions et les modalités de qualification des organismes pour effectuer les mesures de concentration des agents chimiques pouvant présenter un risque pour la sécurité et la santé des salariés.
	Arrêté du ministre du travail et de l'insertion professionnelle n° 1281-18 du 15 mars 2018 déterminant les appareils ou les machines ou les catégories d'appareils ou de machines pour lesquels l'employeur procède ou fait procéder à des vérifications générales périodiques et fixant la périodicité des vérifications, leur nature et leur contenu.
	Arrêté du ministre du travail et de l'insertion professionnelle n° 1282-18 du 15 mars 2018 fixant les conditions et les modalités de désignation des organismes qualifiés pour réaliser les vérifications générales périodiques des appareils ou des machines ou des catégories d'appareils ou de machines.
Social security (general standards)	Décret-loi n° 2-18-781 du 10 octobre 2018 portant création de la Caisse marocaine de l'assurance maladie.
	Loi n° 65-15 du 12 avril 2018 relative aux établissements de protection sociale.
Migrant workers	Arrêté du ministre du travail et de l'insertion professionnelle n° 3350-18 du 30 octobre 2018 modifiant de l'arrêté du ministre de l'Emploi et de la Formation professionnelle n° 350-05 du 9 février 2005 fixant le modèle du contrat de travail réservé aux étrangers.
Seafarers	Décret n° 2-17-788 du 2 octobre 2018 relatif à la délivrance des brevets et certificats d'aptitude et aux conditions requises pour l'exercice de la profession de marin à bord des navires de commerces.
Fishers	Décret n° 2-17-455 du 26 avril 2018 pris pour l'application de certaines dispositions du Titre I de la loi n° 15-12 relative à la prévention et à la lutte contre la pêche illicite, non déclarée et non réglementée et modifiant et complétant le dahir portant loi n° 1-73-255 du 23 novembre 1973 formant règlement sur la pêche maritime.
	Décret n° 2-17-456 du 15 mars 2018 pris pour l'application de certaines dispositions du dahir portant loi n° 1-73-255 du 23 novembre 1973 formant règlement sur la pêche maritime.
2019	
General provisions	Décret n° 2-19-947 du 17 octobre 2019 modifiant et complétant le décret n° 2-12-349 du 20 mars 2013 relatif aux marchés publics.
	Décret n° 2-19-575 du 7 août 2019 fixant le montant maximum du micro-crédit.
	Loi n° 14-16 du 11 mars 2019 relative à l'Institution du Médiateur.
	Loi n° 91-18 du 13 février 2019 modifiant et complétant la loi n° 39-89 autorisant le transfert d'entreprises publiques au secteur privé.
	Loi n° 85-18 du 9 janvier 2019 modifiant la loi n° 18-97 relative au micro-crédit.
	Loi n° 89-17 du 9 janvier 2019 modifiant et complétant la loi n° 15-95 formant Code de commerce.
Elimination of child labour, protection of children and young persons	Loi n° 06-19 du 8 février 2019 modifiant la loi n° 89-15 du 2 janvier 2018 relative au Conseil consultatif pour la jeunesse et l'action associative.
Equality of opportunity and treatment	Décret n° 2-18-856 du 10 avril 2019 pris pour l'application de la loi n° 103-13 relative à la lutte contre les violences faites aux femmes.
Social security (general standards)	Décret n° 2-19-328 du 29 août 2019 pris pour l'application du décret-loi n° 2-18-781 du 10 octobre 2018 portant création de la Caisse marocaine de l'assurance maladie.
Migrant workers	Arrêté du ministre du Travail n° 1356-19 du 19 avril 2019 fixant le modèle du contrat de travail réservé aux étrangers.

Source: ILO, NATLEX, Morocco, 2019

Table 25: Morocco's ratification of ILO Conventions

Subject and/or right	Convention	Ratification date
Fundamental Conventions		
Freedom of association and collective bargaining	C087 - Freedom of Association and Protection of the Right to Organise, 1948	Not ratified
	C098 - Right to Organise and Collective Bargaining Convention, 1949	1957
Elimination of all forms of forced labour	C029 - Forced Labour Convention, 1930	1957
	C105 - Abolition of Forced Labour Convention, 1957	1966
Effective abolition of child labour	C138 - Minimum Age Convention, 1973	2000
	C182 - Worst Forms of Child Labour Convention, 1999	2001
Elimination of discrimination in employment	C100 - Equal Remuneration Convention, 1951	1976
	C111 - Discrimination (Employment and Occupation) Convention, 1958	1963
Governance Conventions		
Labour inspection	C081 - Labour Inspection Convention, 1947	1958
	C129 - Labour Inspection (Agriculture) Convention, 1969	1979
Employment policy	C122 - Employment Policy Convention, 1964	1979
Tripartism	C144 - Tripartite Consultation (International Labour Standards) Convention, 1976	2013
Technical Conventions (Up-to-date and in force)		
Working time	C014 - Weekly Rest (Industry) Convention, 1921	1956
	C106 - Weekly Rest (Commerce and Offices) Convention, 1957	1974
Social policy	C094 - Labour Clauses (Public Contracts) Convention, 1949	1956
Migration workers	C097 - Migration for Employment Convention (Revised), 1949	2019
Social security	C102 - Social Security (Minimum Standards) Convention, 1952	2019
Wages	C131 - Minimum Wage Fixing Convention, 1970	2013
Industrial Relations	C135 - Workers' Representatives Convention, 1971	2002
	C151 - Labour Relations (Public Service) Convention, 1978	2013
	C154 - Collective Bargaining Convention, 1981	2009
Labour Administration	C150 - Labour Administration Convention, 1978	2009
Occupational safety and health	C162 - Asbestos Convention, 1986	2011
	C176 - Safety and Health in Mines Convention, 1995	2013
	C187 - Promotional Framework for Occupational Safety and Health Convention, 2006	2019
Employment policy and promotion	C181 - Private Employment Agencies Convention, 1997	1999
Maternity Protection	C183 - Maternity Protection Convention, 2000	2011
Fishers	C188 - Work in Fishing Convention, 2007	2013
Seafarers	MLC - Maritime Labour Convention, 2006 *	2012 *

* Amendments from 2015 and 2016 to the MLC were in force in 2017 and 2019, respectively; the amendments of 2018 have been accepted and will enter into force on December 26, 2020.

Note: Fundamental Conventions are the eight most important ILO conventions that cover four fundamental principles and rights at work. Equivalent to basic human rights at work. Governance Conventions are four conventions that the ILO has designated as important to building national institutions and capacities that serve to promote employment. In other words, conventions that promote a well-regulated and well-functioning labour market. Per July 2020, there were 85 up-to-date conventions listed.

Source: ILO, NORMLEX, Country Profiles: Morocco

Table 26: List of CBAs signed by UMT, 2009-2020

No.	Date	Company/Employer	Sector	City	Workers covered
1	10/03/2020	Bombardier	Aeronautics	Casablanca	400
2	05/01/2020	S.S. Co. (affiliated to Casa-Technique)	Waste	Sidi Sueliman	-
3	26/12/2019	CARRE (Moroccan Company of Fast Transport)	Transport	Casablanca	370
4	25/04/2019	National Tripartite Agreement on wage increase in public & private sectors	Public & private sectors	National	800,000 public sector workers + ? workers in private sector
5	2019	10 Agreement Protocols *			-
6	04/05/2018	General Agency of National Education **	Health insurance	Casablanca	-
7	23/11/2017	Pizzorno Environnement	Waste	Hoceïma	-
8	08/01/2014	SAFI LAND	Agriculture	Safi	-
9	23/09/2014	Tangier Port Co.	Sea ports	Tangier	-
10	24/03/2009	Fish Curing factory	Fish curing	Safi	-

* UMT concluded 10 local agreement protocols (protocol d'accord) in 2019, out of which 2 were with hotels, 1 was for shipping workers of Mohamed V airport shipping and 1 covered 1,200 workers in a goods transport company. The benefits in most of these agreements were wage increases, improved pension schemes and promotion of social dialogue.

** UMT, in cooperation with UNTM, signed a tripartite CBA with government and CGEM for wage increases in both public and private sectors. The agreement included a wage increase for 800,000 employees in the public sector and a 10% wage increase in the private sectors of agriculture, commerce, services and industry, divided on 2 years: 5% each July of 2019 and 2020.

Source: UMT

Table 27: Specific labour and employment issues governed by Morocco's Labour Code

Issues
Conditions of employment and work, employment contracts, and termination of employment and dismissal
Terms of work and wages, including minimum wage; minimum age for employment; maternity protection; hours of work and overtime; paid annual and holiday leave; policies; for special categories of workers; and occupational safety and health protection.
Prohibition of forced labour.
Trade union affairs and the election and functions of labour representatives.
Collective bargaining and the settlement of collective labour disputes, including conciliation and arbitration.
Labour market programs to match workers with employment opportunities, including for Moroccan workers abroad and foreign workers.
Labour inspections, including the roles and responsibilities of labour inspectors.

Source: ILO, Good practices on the promotion of freedom of association and collective bargaining rights in Morocco, October 2015

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