

LABOUR MARKET PROFILE



ULANDSSEKRETARIATET – DTDA
DANISH TRADE UNION DEVELOPMENT AGENCY

Morocco

2023/2024

This profile provides a comprehensive overview of the labour market situation in the country.



PREFACE

The Danish Trade Union Development Agency (DTDA) is the development organisation of the Danish trade union movement.

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

DTDA collaborates with trade union organisations in Africa, Asia, Latin America, and the Middle East. The programmes' immediate objective 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 the labour-related Sustainable Development Goals (SDGs).

The Labour Market Profile (LMP) provides a comprehensive overview of the labour market's structure, development, and challenges. It applies several central indicators addressing labour market aspects, including unionism, social dialogue, bi-/tri-partite mechanisms, policy development, and legal reforms status' compliance with international standards, just transition, 4IR, among others.

As part of programme implementation and monitoring, national partner organisations provide annual narrative progress reports, including information on labour market developments. Furthermore, specific data and information relating

to central indicators are collected using a unique data collection tool.

National statistical institutions and international databanks are used as a source 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, and other internationally recognised labour-related global indexes.

Academia and media sources (e.g., national news) are used in research on labour market issues.

The profile is regularly updated; the current version covers 2023 to 2024. Labour Market Profiles for more than 20 countries are available on DTDA's website: <https://www.ulandssekretariatet.dk/>.

DTDA prepared the Labour Market Profile in close collaboration with the Moroccan Labour Union (UMT). If any comments arise to 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 income per capita grew during the last two decades, and poverty fell to one-third of its 2000-level, supported by an upsurge in wage earners. This development was led mainly by the localised creation of more high-end jobs in free export zones. Spillovers to other sectors and areas of the country have been limited, echoed in the country's low-slung labour productivity. The economy depends on industries that are vulnerable to climate change, stirring shifts in the labour market landscape; for instance, the kinds of work, qualifications, and training required to fill openings. At the policy level, the scope of Just Transition is still uncertain in Morocco.

Although the country has improved its legal framework for the labour market, it still discriminates against farm workers, visualised in twisted wages and employment regulations. Laws and regulations around the life cycle of a working woman score better than the regional average. On the other hand, workers are generally challenged by regular violations of rights in practice. Morocco's involvement in trade agreements is accelerating in Africa but they sideline labour provisions.

While social dialogue is in progress at the tripartite policy level, including a tripartite Roadmap for Social Dialogue in 2022, the application of Collective Bargaining Agreements (CBAs) at the enterprise level is underdeveloped. Even though unionism has been struggling with several hurdles during the last two decades, central trade unions have registered an upsurge in the membership rate. The trade union density stood at least 11% of employees in 2022, based on a flat growth rate since 2019. Additionally, labour dispute resolution entered an updated arbitration system in 2022, and the alternative dispute resolution (ADR) scheme is gaining more attention but is somewhat imbalanced with the traditional judiciary system. The number of labour

inspectors pointedly increased in recent years, but their scale is still below the International Labour Organization's recommendation threshold.

Morocco's employment growth increased by just 2.5% during the last decade, driven by men, while it considerably fell for women. Youth unemployment is steadily rising even though their employment share of total employment is dwindling, tapping further pressure on programmes' initiatives to curb unemployment. This stance supports the relatively high emigration flow, and the personal remittances reached its record of 8.3% of GDP in 2022, far above foreign direct investments.

Despite the rapid expansion of the supply of education services, it faces challenges in quality and many teachers' poorly contractual conditions. The extent of enrolment in vocational training is increasing significantly, and firms offering formal training programmes are amplifying. The Fourth Industrial Revolution (4IR) is linked with the country's policy priorities, bringing a tailwind in the information communications and technology (ICT) sector. It still lags behind the leading Artificial Intelligence (AI) countries in the Middle East and Northern Africa.

A new legal framework on social protection was adopted in 2021, one of the most relevant milestones in social protection extension, accelerating the implementation of major structural reforms. Although the country has demonstrated improvements in central health indicators and universal health insurance coverage in 2022, other central pension schemes have faced weak coverage results. Due to the historic rise in food and energy prices in 2022, state subsidies for basic commodities reached record-high levels, weighing down on the country's foreign currency reserves and bringing poverty reduction in limbo.

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	A series of policies have been launched recently: the New Development Model, the 2020–2030 Green Generation strategy, the National Plan for Gender Equality III (2022-2026), the National Strategy for Combating Violence against Women and Girls (2022-2030), the Integrated Public Policy Project for Social Protection 2020-2030.
ILO standard setting on improvement of status of workers from the informal economy	National forums dealing with informal economy workers and specific policies addressing the status of informal economy workers are in the an initial phase, supported by a list of recommendations to formalise the status of street vendors.
Guaranteeing rights at work	
Growth in partner trade union members (%)	Aggregated growth of 12% from 2019 to 2022.
Violations of trade union rights	Morocco ranks 3 of 5+ (5+ is the worst) on the 2023 Global Rights Index. *
Labour legislation is improved according to ILO standards	The law on the Charter of public services; the Framework Law on Social Protection; the law on the exercise of craft activities; the education framework law; a new arbitration legal framework. Morocco further has undertaken considerable efforts to advance its climate policy framework via several climate change-related laws.
Partner organisations with minimum 30% women representation in decision-making bodies	Data not available.
Extending social protection	
Coverage of health insurance as % of total population in partner country	100% are affiliated with health insurance since 2022, covering treatment costs, medicines, and hospitalisation.
Workers from the informal economy have access to national social security schemes	The scheme for generalisation of social protection announced in 2021, targets broadening the scope of social protection to cover 23 million beneficiaries. The decree allows the self-employed to voluntarily join the national social security fund and enjoy the coverage.
Promoting social dialogue	
Trade union density of employees (%)	11% in 2022. ***
Cooperation in labour-employer relations	Morocco ranks 104 of 141 countries (1 is the best). **
Number of Collective Bargaining Agreements (CBAs)	68 CBAs between 2011 and 2021.
Workers' coverage of Collective Bargaining Agreements to employees	3%.
Bi-/tri- partite agreements concluded	At the bilateral level, the General Confederation of Moroccan Enterprises and the two most representative trade unions in the private sector prepared a draft bill on teleworking in 2021. In 2022, tripartite social dialogue reached the latest agreement of the nominal minimum wages to increase by 10% on average; an agreement was signed to promote the rights of workers, including foreign workers; a Roadmap for Social Dialogue was launched, which has been considered a historic agreement with the most representative trade unions and employers' representatives. In 2023, the Moroccan government and education unions reached a unified employment status for national education employees.
<p>* It is classified as a "regular violations of rights," i.e., government and/or companies are regularly interfering in collective labour rights or are failing to guarantee these rights fully. There are also deficiencies in laws and/or specific practices, making frequent violations possible.</p> <p>** This indicator is based on data from the Global Competitiveness Index's labour market efficiency indicator, representing employers' opinion via surveys.</p> <p>*** Based on the limitations of data availability, this figure represents just three train union centres (CDT, UGTM, and UMT); thus, it underestimates of the total coverage.</p> <p>Sources: International Labour Organization; International Trade Union Confederation; World Economic Forum; WageIndicator.org; DTDA research and own calculations on the trade union density and CBAs coverage.</p>	

COUNTRY MAP



Source: National Online Project.

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ECONOMIC PERFORMANCE

Morocco has made significant economic progress over the last two decades, raising the living standards and improving its business environment. The country is a low-middle-income emerging country but aspires to reach upper-middle-income status in near future. It benefits from one of the highest investment rates in the world, driven by massive public investments and considered the most competitive economy in Northern Africa.

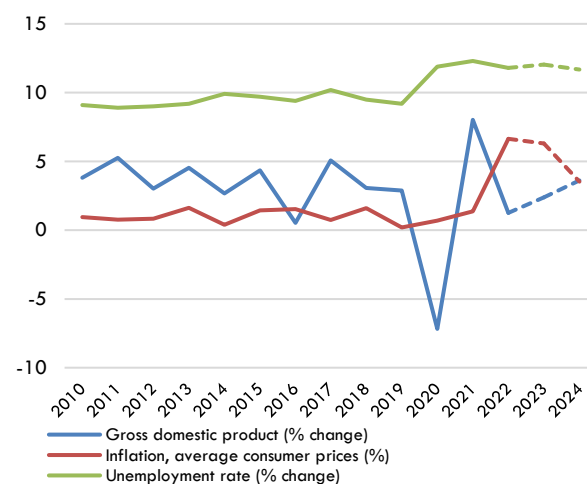
After the elections in Morocco in 2022, the National Rally of Independents (RNI) coalition was in power. The government promotes the New Development Model (NMD), aiming to curb the inequalities in the country, raising incomes, increasing private investment, taking better care of the natural resources, increasing the number of women in the workforce, as well as reducing underage marriage and increasing social inclusion. The government is further reforming the state-owned enterprise (SOE) system and reviewing the investment charter.

Morocco's economy delivered volatile growth during the last decade and was not strong enough to significantly reduce unemployment. More unpredictable figures entered the scene recently: the growth rate plummeted to -7.2% in 2020 due to the Covid-19 pandemic. This situation costed a hike in government spending, mounting debt, and unemployment upsurge (Figure 1 and Appendix Table 8). The economy rebounded in 2021, peaking at 8.0%. In 2022, a series of overlapping shocks led to an abrupt deceleration of economic activity, and growth dropped to just 1.3%. It was due to the impact of another drought, the third one in the last four years, which led to a sharp contraction in agricultural GDP, not to mention as an importer of energy and food, Morocco has been affected by the commodity price shocks triggered by the Russian war against Ukraine.

Inflation in consumer prices has been controlled during the last decade, except for a significant rise in 2022, topping at 6.6% because of the global economic rupture. It brought adverse effects on business in Morocco and boomed in high costs of imports like fuel, wheat, and fertiliser (see more in

the Social Protection section). It put further pressure on public finances, mainly through subsidy spending, and thwarted workers' income purchasing power.

Figure 1: Gross domestic product, inflation, and current account balance projections in Morocco, %, 2010-2024



Source: International Monetary Fund, World Economic Outlook Database, October 2023.

The major resources of the Moroccan economy are agriculture, phosphate minerals, and tourism. Firstly, over half the active workforce operates in the agricultural sector. It is divided between a modern industrial sector producing food for export and smallholdings producing food mainly for local markets and farmers' subsistence. As already indicated, drought and soil degradation have negatively affected this sector. Secondly, the country is the world's third-largest producer of phosphates, and the price fluctuations on the international market greatly influence the economy. Thirdly, the tourist sector got particularly hit by the Covid-19 pandemic impact.

The service sector holds the economic backbone of around 52% of GDP in 2021, with a value-added in line with the regional average. The industry sector represents 26%, with a minor declining trend during the last decade, and the regional average substantially supersedes its value added. The agricultural sector contributed 12% of GDP in 2021, with the value-added on par with the regional average.

Inequality in the distribution of Moroccan family income stood stable during the last two decades, which was relatively higher compared with other Northern African countries.¹ However, the Covid-19 pandemic and structural unemployment have most likely brought inequality on the rise in recent years. The Human Development Index (HDI) ranked Morocco as medium human development at 123 out of 191 (1 is best) countries in 2021, three steps ahead in the HDI ranking from 2015 to 2021.

Morocco's poverty headcount ratio fell significantly during the last two decades, from 15% in 2000 to 4.8% of the population in 2013. Projections suggest the rate will be down to 2.4% in 2022.² This measurement is relatively low compared to neighbouring Northern African countries, protected by real minimum wage increase, escalated high inflow of remittances, and social protection programmes. The economic ruptures in 2020 brought more Moroccan balancing at the poverty line, just as existing poverty will likely get more severe through the low-income group, directly affected by consumption and the disruption of services (see more in the Working Conditions and the Social Protection sections).

Just Transition

Morocco has undertaken considerable efforts to advance its climate policy framework via several climate change-related laws, policies, and plans to protect the environment for the betterment of present and future generations. The country set up its National Adaptation Plan (NAP) to develop an inclusive initiative to support adaptation planning and priority actions. For instance, renewable energy ambitiously has been projected to create up to half a million jobs by 2040 in Morocco.³

The economy depends on sectors vulnerable to climate change, such as agriculture, fisheries, and tourism. Water scarcity, food insecurity, desertification, and shoreline erosion are growing problems in the country. For example, recurrent severe heatwaves and prolonged droughts triggered a sharp reduction in cereal crops. It has catastrophic impacts on small-scale farmers and

agriculture in general. The effects of shifts are disproportionately experienced by the marginalised in society, especially small-scale farmers, agro-pastoralists, and agricultural labourers. This situation coincided with the stress that global food markets in the aftermath of the war in Ukraine posed a challenge to food security.

Morocco's main dams for water storage also have hit historical lows, implying that should rainfall levels not recover soon, various cities could face severe shortages. Additionally, climate migration tends to move people into urban areas with high population densities, which most likely triggers a resource supply strain (see more in the Migration subsection).⁴ It will push new structures for the education and training of young people to improve employability and income in rural areas.

The country's 2020–2030 Green Generation strategy aims to increase agricultural resilience to climate change, including replanting 133,00 ha of forests and creating 27,500 additional jobs. The Climate Action Tracker indicates Morocco has achieved its conditional mitigation targets because of its expanded renewable energy capacity. The country stands eighth on the 2022 Climate Change Performance Index: the only non-European country in the top twenty. A revised Nationally Determined Contribution (NDC) goal in 2021 to reduce its greenhouse gases (GHG) emissions by 2030 included mitigation targets for two large industrial subsectors: cement and phosphates, which is particularly important as Morocco holds approximately 75% of the world's phosphate reserves. The climate targets and policies have been assessed as "almost sufficient".⁵

The current green energy transition will reshuffle global energy markets with a trickle-down effect on the transportation, manufacturing, and construction sectors. Morocco's labour market will experience the upheaval of these shifts in renewable energy sources, market penetration by new technologies, and the emergence of new supply chains. It further alterations the kinds of work, salaries, education, qualifications, and training required to fill openings.

The scope of ensuring stable livelihoods for those changes affected by the transition is still uncertain.

Morocco's trade union movement is engaged with several multinational companies in the oil and gas sector to discuss the challenges and impact of the energy transition and guarantee a Just Transition where workers' benefits and rights are respected.⁶

Special Economic Zones

The Free Zones Law of 1994 opened for industrial zones across the country, representing 119 Industrial Zones, seven Special Economic Zones (SEZs) (also known as Free Zones), and about 10,000 Industrial Operators today.⁷ Globally, the SEZs have been ranked among the top zones; for instance, the Tangier Med Zone even ranked 2nd best world economic zone in the Financial Times' FDI Global Free Zones of the Year 2020.

Interlinked sector-specialised areas are part of the Industrial Acceleration Plan (IAP). The first phase, 2014-2020, targeted 500,000 industry jobs by 2020. This plan has entered its second phase between 2021-2025, seeking to strengthen progress. It is linked with the automobile, aeronautical, food, and phosphates industries. As previously mentioned, the industry sector has not delivered increases in value-added during the last decade.

EPZs benefit from tax incentives. Work contracts are not always written; if they are, they are fixed-term contracts. Some companies do not respect the duration of maternity leave, and pregnant women suffer from intensive pressures to quit their jobs, mainly from management. Their wages declared are often below the wages paid, and many workers are not reported to the Social Security National Fund. Organising workers in the free zones has been complicated; for instance, trade union access was heavily restricted, making freedom of association almost impossible. Workers were often scared to form trade unions for fear of losing their jobs (see more in the Trade Union Rights Violations section). Although the Labour Code requires labour inspectors to enforce labour regulations, trade union

organisations have denounced the passivity and incapacity of the labour inspectorate. They argued that inspectors could not access the FZs freely and that they did not reply to requests from workers to visit the workplaces.⁸

LABOUR LEGISLATION

The labour-related legal framework sets standards and restrictions for the labour market in Morocco. Many regulations are based on Royal Decrees (*Dahirs*), and the Labour Code repealed several. A range of laws, decrees, orders, and plans were approved in recent years (see Appendix Table 6).

Some of the main legislation approved in recent years was the law on the Charter of Public Services and the Framework Law on Social Protection, both in 2021, and the law on the exercise of craft activities of 2020. Generally, reforming the labour-related legal framework has been somewhat stalled by lack of compromises between social partners.

The government launched policies to strengthen the labour market and its job creation. The central policies in recent years are the National Agency for the Promotion of Employment and Skills (ANAPEC), aiming to expand the agency's coverage to include unqualified job seekers.⁹ A new National Employment and Entrepreneurship Policy (NEEP) has been under review via consultations and based on four priority issues: improving the integration of young people into the labor market, optimizing the emergence of a dynamic private sector that creates jobs, promoting equality between men and women in access to employment, and strengthening labor market governance.

Status of the central labour legislation is summarised below.

Constitution

In 2011, a new constitution was approved via referendum. It was an aftermath of protests in February 2011, a part of the wave of uprisings in the Middle East and North Africa (MENA). The constitution transferred several powers from the

king to the prime minister, such as appointing high-level civil servants, granting amnesty, and presiding over cabinet meetings. Arguably, it did not make real changes in powers in practice.

The constitution enshrines freedom of association, the right to strike, and the freedom to join unions. It also strengthens the role of trade unions as social and democratic players, maintaining a quota for their representation in the Upper Chamber of the Parliament (see more in the Social Dialogue section).

Labour Code

The Labour Code was established by *Dahir* (royal decree) in 2003, based on a year-long tripartite process. It regulates employment relations, working age, maternity leave, working hours, occupational safety, health, wages, trade unions, employers' representation, social dialogue, and relevant councils. It also standardises the settlement of collective labour disputes (see more in Appendix Table 7). Although the code recognises the right to collective bargaining and the right to strike, both are strictly regulated.

The Labour Code prohibits antiunion discrimination and companies from dismissing workers for participating in legitimate union-organising activities.

Social protection

The Framework Law on Social Protection of 2021 was one of the most relevant milestones in the social protection extension of Morocco. Some of the central goals are i) the generalisation of compulsory health insurance (AMO) by the end of 2022; ii) the generalisation of family allowances by 2023/2024; iii) broadening the pension schemes coverage in 2025; iv) the generalisation of unemployment benefit scheme in 2025 to cover all persons in stable employment through the simplification of the eligibility conditions and the extension of beneficiaries (see more in the Social Protection section).

Law Advances Domestic Workers' Rights

The Law Advances Domestic Workers' Rights of 2016 was considered ground-breaking for domestic workers. Domestic workers were excluded

from the Labour Code, leaving them no legal rights to a minimum wage, no limits on their hours, and not even a weekly day of rest, not to mention depriving them of the right to form unions. The law fixed the working and employment conditions for domestic workers, improving 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. Many domestic workers still experience exploitation, and the law offers less protection than the Labour Code for other workers.

Observations on labour legislation

The International Trade Union Confederation (ITUC) listed observations of the labour-related legal framework in Morocco concerning the international standards in the right to freedom of association, the right to collective bargaining, and the right to strike (see details in Appendix Table 10).¹⁰

Reports found that the government generally respected freedom of association for labour unions and the right to collective bargaining.¹¹ On the other hand, around eight of ten workers operate in the informal economy, bringing loopholes in labour and business regulations in practice often due to a lack of awareness or incentives.

Ratified ILO Conventions

The International Labour Organization's (ILO) conventions enumerate international principles and rights at work: currently, Morocco ratified 65 conventions. Appendix Table 9 shows that eight of ten fundamental conventions and all Governance Conventions are approved, and 17 of 176 Technical Conventions are Up-To-Date and actively promoted. The latest ratified conventions are the Migration for Employment Convention (C097), the Promotional Framework for Occupational Safety and Health Convention (C187), and the Social Security (Minimum Standards) Convention (C102), all from 2019.

The independent ILO body, known as the Committee of Experts on the Application of Conventions and

Recommendations (CEACR), listed observations and direct requests for several conventions. For instance, in 2022, CEACR had comments dealing with the Right to Organise and Collective Bargaining Convention (C098), including:

- The government does not address the allegations concerning anti-union acts.
- The government was requested to report on all progress made in the adoption of the Trade Union Bill, which provided for a lowering of the level of representativeness required to engage in negotiation. However, it is on hold due to resistance from trade union centres.
- CEACR urged the government to take all the necessary measures to amend its legislation so that it grants the right to organize and engage in collective bargaining to staff in the prison administration, to lighthouse, water and forestry workers, as well as to public employees and civil servants who exercise a function involving the right to carry a weapon.
- CEACR requested the government to continue to provide information on the measures taken to promote collective bargaining.

Morocco has one follow-up freedom of association case initiated in 2013 via ILO's complaints procedures. It deals with the complainant reporting the authorities' exclusion of the Democratic Union of the Judiciary (SDJ) from all collective bargaining despite being the most representative organization in the sector, harassment of the organisation's members and the violent dispersal of peaceful demonstrations by the security forces. A total of 67 cases are closed.

Trade Agreements

Morocco signed several trade agreements voiding labour clauses. For example, the country is linked with the Global System of Trade Preferences among Developing Countries (GSTP), which lacks labour provisions. At the regional level, Morocco is member of the Pan-Arab Free Trade Area (PAFTA) and the Agadir Agreement, both have no labour provision.

The government council ratified an agreement to participate in the African Continental Free Trade Area (AfCFTA), one of the ambitious flagship regional integration programmes of Agenda 2063: The Africa We Want. This agreement is targeting to promote trade liberalisation in Africa. The Tunis declaration from September 2022 by trade unions from 39 African countries stresses the inclusion of labour provisions in the AfCFTA agreement to ensure compliance with international labour standards and the decent work agenda.¹²

Morocco formally applied to join the Economic Community of West African States (ECOWAS) in February 2017, which contains labour provisions. However, its bid has been stalled for geopolitical, legal, and political reasons in the face of opposition from protectionist Western African economic actors. It was based on worries about opening its borders to the free movement of labour and a change of currency; goods imported through Morocco's free trade agreements with Europe and elsewhere could flood their market and compete unfairly against them.¹³

In November 2017, Morocco began negotiations with the South American trading bloc MERCOSUR to establish a free trade area. MERCOSUR parliament and the Moroccan Parliament signed a Memorandum of Understanding in November 2022, strengthening the ties of cooperation between the two parties and exploiting the opportunities offered in the African, Mediterranean, and Latin American zones. This agreement has vague links with labour provisions.

Morocco has signed several Free Trade Agreements (FTAs) with other countries. Again, few have labour provisions. The EU is Morocco's leading trade partner and the biggest foreign investor in the country. Negotiations for a Deep and Comprehensive Free Trade Area (DCFTA) between the EU and Morocco were launched in March 2013, but negotiations were put on hold at Morocco's request since April 2014. Instead, the EU and Morocco signed the Green Partnership concerning climate and energy, the environment, including marine and maritime issues, and the green economy.

The United States-Morocco FTA has been comprehensive and includes chapters detailing commitment to intellectual property rights, labour, and environmental protection; for instance, both partners are obligated to enforce the four core ILO labour standards and acceptable conditions of work, in a manner affecting trade.¹⁴ The FTA brought focus on protection against anti-union discrimination, including a legal basis for reinstatement and back pay.

SOCIAL PARTNERS

Social partners are central to promoting 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 workers' social protection.¹⁵ The ministry is mandated to promote social dialogue, conduct labour related research, and expand employment opportunities, including with links with the three trade unions currently represented in the Council of Advisors of the Parliament.

The Minister of Economic Inclusion, Small Business, Employment and Skills is responsible for elaborating and implementing the government's policy in labour, employment, vocational training, micro business and self-entrepreneur, and evaluating their action plans.

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.

The application of Morocco's active labour market policy has been supported by the National Agency for the Promotion of Employment and Competencies (ANAPEC). This public agency is designed to implement active labour market policies (ALMPs), connect employers to job seekers, and provide information and guidance to job seekers and young entrepreneurs. Other ministries have also implemented actions within the themes of:

- Youth integration includes plans to improve the training system and integrate youth into the labour market through internships or skill matching.
- Employment, which aims to increase overall employment and productivity.
- Microenterprise promotion, which intends to support Microenterprise financing.
- Other sectoral plans aiming to promote job creation through enhancing macroeconomic conditions, 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 acceleration an expanding of social welfare protection to all its citizens.¹⁶

Trade Unions

The trade union movement is a central social force in Morocco. Casablanca has a concentration of unions, while some unions have moved offices to the capital Rabat to engage more with the government. The country has still not ratified the international fundamental convention on Freedom of Association and Protection of the Right to Organise (C087) (Appendix Table 9).

Most union federations are affiliated with political parties and receive financial support from the state. Central trade union organisations have representation in the upper chamber of the parliament (see more in the Social Dialogue section). Generally, the trade union movement has for a long period worked on improving a stronger unified base.

A complete updated dataset of the number of trade unions and membership rates was scarce. There are six leading trade union centres; three of them – the Moroccan Labour Union (UMT), the General Moroccan Trade Union (UGTM), and the Democratic Labour Confederation (CDT) – represented 651,000 members in 2022 (Table 1 and Appendix Table 12). According to data from ITUC, the aggregated trade union membership rate among these three centres increased by 12% from 2019 to 2022.

Table 1: Status of trade unions in Morocco, 2022

Indicator	Values
Trade union membership rate	651,200 *
Trade union density – employment	5.7% *
Trade union density - employees	11% *

* Data from UMT, UGTM, and CDT.

Source: International Trade Union Confederation; own estimations on trade union density supported by employment data from ILOSTAT.

Based on data availability limitations, Morocco's trade union density of employees was somewhat underestimated by 11% in 2022, appearing lower than the OECD average of 16%. It points to a flat growth rate from 2019 to 2022, suggesting that the upsurge in the membership rate stood on par with the employees' rate.

During the last two decades, the trade union movement has struggled with the declining employment in the manufacturing sector, weak protection for the right to organise, the lack of a law governing union responsibility, and limitations to the advisory functions of trade unions. The lack of awareness of unionism, the widespread informal economy, and domination of micro-enterprises in the private sector are also challenging factors.

Women's enrolment in unionism has been weak but on the rise.¹⁷ Other improvements in unionism have been to bring more women into leadership positions within the central trade unions.¹⁸ On the negative side, the Labour Code excludes migrant workers from assuming leadership positions in unions.

Three trade union centres – UMT, CDT, and the Democratic Labour Federation (FDT) – signed a

strategic agreement on united trade union action 2014. The alliance aimed at tackling anti-democratic and anti-popular policies and its outright dismissal of the trade union organisations' calls for a frank and constructive social dialogue.¹⁹ Today, the three confederations now coordinate on policy positions and demands. They organise joint events and demonstrations and coordinate negotiations with the government. Other coalitions join these coordinated efforts.

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

Moroccan Labour Union

The Moroccan Labour Union (UMT) 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. The organisation registered 346,000 members in 2022 with a meagre growth of 3% 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 68 local/regional federations.

General Moroccan Trade Union

The General Moroccan Trade Union (UGTM) was a breakaway from UMT, linked to the conservative political Istiqlal party. UGTM's membership portfolio covers a broad segment and affiliates academic institutions and trade union organisations. The organisation declared 205,000 followers in 2022, which is a drastic decline from 755,000 members in 2012. UGTM registered 37 affiliated sector federations and 70 local/regional federations.²⁰

Democratic Labour Confederation

The Democratic Labour Confederation (CDT) was created in 1978, as it broke out of UMT over political factors. CDT has historically had ties to the political left, notably the socialist party USFP. During the 2011 Arabic Spring movements in Morocco, CDT supported the protest movement M20. The organisation declared 100,000 members in 2022 up by 63% from 2012.

Employers' Organisations

Employers – those workers who, working on their own account or with one or a few partners, hold the type of jobs defined as a "self-employment jobs" – represent about 2.3% of the total employment in Morocco, which was smaller than the Middle East & Northern Africa average of 4.5%.²¹

The Global Competitiveness Index provides the Moroccan employers' view on a wide range of aspects, including labour market efficiency. The index is based on surveys among employers in Morocco. It shows that the labour market is somewhat rigid, ranking 119 of 141 countries (1st is the best). The lowest rankings were the ratio of wage and salaried female workers to male workers, lack of active labour market policies, and cooperation in labour-employer relations. The best scoring was in the flexibility of wage determination (see more in the Appendix Table 11).

Based on the list of 35 risks in the Global Risks Report 2023, identified by the Moroccan Executive Opinion Survey, the five risks that are the most likely to pose the biggest threat to the country in the next two years are cost-of-living crisis, rapid and/or sustained inflation, severe commodity price shocks and commodity supply crisis, and debt crisis.²²

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

General Confederation of Moroccan Enterprises

The General Confederation of Moroccan Enterprises (CGEM) is a central employers' organisation with 33 affiliated sectoral federations. The organisation operates with 22 commissions, including the Committee for Employment and Social Relations related to collective bargaining agreements. CGEM registered at least 90,000 direct and affiliated members in 2023, 95% of which are small businesses. It has established itself as the official representative of the private sector with public authorities, social partners, and institutions.²³

Federation of Chambers of Commerce, Industry and Services

The Federation of Chambers of Commerce, Industry and Services (FCCIS) coordinates and represents 12 Regional Chambers of Commerce, Industry and Services (CCIS) spread across the country. The organisation listed 872 members of CCIS in July 2023, elected by all Industrial merchants and service providers.²⁴ Other reports noted that FCCIS does not call itself an employers' association ("*patronat*") and is seen as a public entity by trade unions.

SOCIAL DIALOGUE

At the national level, the tripartite social dialogue took steps ahead during the last two decades in Morocco. The ambience entered a combative stage at the end-2010s, due to controversial reforms and the government did not meet its social dialogue commitments.

In 2021, a new development model was adopted, providing for social dialogue, and revising the Labour Code in consultation with the social partners. In February 2022, a Roadmap for Social Dialogue was launched, which has been considered a historic agreement with the most representative trade unions and employers' representatives.²⁵ It includes forming a committee comprising secretaries from unions and ministers, overseeing forming sub-committees to deliberate over central issues. In addition, a technical committee will oversee the drafting of union demands into legislation, which is for the first time.²⁶ It led to a tripartite agreement in April 2022, signing the minutes of a social agreement and a national charter of social dialogue. In 2023, this agreement brought numerous subjects on the table, including the constitutional right of workers linked to the exercise of the strike, as well as the Labour Code. It signals that the government has improve their approach of meaningful dialogue.

Reports found that the government generally respected the right to collective bargaining. However, employers limited the scope of collective bargaining, frequently setting wages unilaterally

for most unionised and non-unionised workers. The Labour Code allows independent unions to exist but limits collective bargaining rights to those representing 35% or more of the workforce within an enterprise. Unions may legally negotiate with the government on national-level labour issues. At the sectoral level, trade unions negotiated with private employers concerning minimum wage, compensation, and other concerns.²⁷

At the enterprise level, trade unions are represented on work councils as well as Occupational Safety and Health (OSH) committees in formal large companies. The private sector landscape is dominated by micro- and small enterprises, linked with the widespread informal economy. It reduces the bounds of application of these councils and committees, not to mention side-lines informal workers in social dialogue and social insurance.²⁸

Application of Collective Bargaining Agreements (CBAs) was only slowly initiated, reflected by 20 CBAs from 1978 to 2012. It has gradually been improved, leading to the signature of 68 collective agreements between 2011 and 2021.²⁹ The collective bargaining coverage rate was estimated at 3.1% in 2022, significantly lower than the OECD at an average of 32%.³⁰

Bipartite negotiations are evolving in Morocco but are still confusing; for instance, the government-held individual bipartite discussions between trade unions and employers' organisations concerning wage negotiations and presented the new wages afterwards. Neither party signs the agreement, but both implicitly accept it.

The House of Councillors is the upper house of the bicameral parliament of Morocco, including 120 members, elected for six years. The members of the chamber are elected indirectly by the elected representatives:

- 72 seats are filled by members of the local authorities via regional and municipal elections.
- 20 seats are filled by all regional elected officials from four professional chambers.

- 20 seats are filled by members of an electoral college elected at the national level by employee representatives of 47,573 members; a majority of 51% of them are without union membership.
- 8 seats are filled by 560 members of an electoral college elected by members of professional employer organisations making up the CGEM.

The latest elections to the House of Councilors took place in October 2021. Some of the interesting results were that CGEM reached from 0 to 8 seats for professional employer organisations. The UGTM rose from 3 to 6 seats and UMT from 6 to 8 seats. Instead, CDT fell from 4 to 3 seats, UNTM from 4 to 2 seats. FDT stood flat with 1 seat. These trade unions succeeded the representativeness criteria (minimum of 6% at the national level). Two other trade unions dropped below this threshold, ODT and SND, losing their seats and ended with zero.³¹ These developments are not significant changes from previous elections but consolidates workers' influence in parliament.³²

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

Based on an interagency structure, the Moroccan National Contact Point for Responsible Business Conduct (NCP) organises promotional events on a regular basis and recently invited three trade unions represented and one business organisation to join the institution. For example, it led to training for trade unions on the NCP Guidelines.³³

Central Tripartite institutions

Morocco's Labour Code sets several tripartite bodies. These institutions fulfil functions such as regulating and giving advice on labour policy, occupational safety and health, collective bargaining, and temporary employment. The bodies meet less frequently than envisaged by law.

Some trade unions have argued that some committees lacked incentives due to bodies with no authority, weak planning, and insufficient expertise. Regulation of the main active labour-related tripartite organs is summarised below.

Collective Bargaining Council

The Ministry of Employment and Social Affairs leads the Collective Bargaining Council (CBC). This council's role is to promote collective bargaining and to propose measures to encourage the conclusion and generalisation of collective agreements. CBC is particularly in enterprises of more than 200 workers at the national or sectoral level. A national plan from 2017 aimed to reach enterprises that fulfil the conditions required to start the collective bargaining process; in 2022, 200 enterprises were targeted in this manner.

Superior Council on the Promotion of Employment

Under the leadership of the Ministry of Employment, the Superior Council on the Promotion of Employment is composed of 21 members (seven governments, seven employers, and seven representative trade unions). It coordinates the employment policies in Morocco. It also provides advice.

National Tripartite Committee on International Labour Standards

The National Tripartite Committee on International Labour Standards normally meet twice a year to discuss wages and financial and budgetary policies.

Other tripartite organs functioning in Morocco:³⁴

- 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).
- Economic, Social and Environmental Council.

Labour dispute resolution system

The arbitration system in Morocco has been haunted by a myriad of regulations, including in the Labor Code of 2003. But a new arbitration legal framework of 2022 was launched and up to date of international standards. Since arbitrable matters include any disposable rights (civil or commercial) without any specific interdiction, employment agreements can be subject to an arbitration clause.

The Moroccan model of conflict resolution is based on three pillars: i) conciliation, in the absence of an agreement, the case goes to arbitration; ii) arbitration that entails a joint decision by the parties; iii) other mechanisms, including the Chambers of Commerce, Industry and Services have their arbitrators, but they are not often used.

Alternative dispute resolution (ADR) has also emerged in Morocco. There is an incompatibility between contemporary approaches to ADR and conflict resolution, which derives from Western principles, while the state judiciary system on dispute and conflict resolution sticks to legalistic tradition and the history of Islamic methods. ADRs fit better the needs of the business environment due to being swift, flexible, confidential, and relatively inexpensive for arbitration and mediation. In contrast, the state judiciary is still in the process of modernisation. Experts found that since the proceedings' language is Arabic, judges are hardly ever confronted with international disputes from the entrepreneurial domain in their traditional training. Besides, a trial before the Commercial Courts is less predictable than arbitration before a panel of experts who usually speak at least French, but often also English, and have international experience.³⁵

Courts have the authority to reinstate workers dismissed arbitrarily and may enforce rulings that compel employers to pay damages and back pay. Reports argue that trade unions complained that the government sometimes used the penal code to

prosecute workers for striking and suppress strikes. Legislation gives the government power to dissolve or deregister unions unilaterally.³⁶

Labour disputes were common in Morocco; in some cases, employers failed to implement collective bargaining agreements and withheld wages. Penalties were sometimes applied against violators. A series of labour conflicts were detected in recent years and strikes turned costly for businesses; for instance, about more than 9,000 employees resorted to strike action in 2022, in support of their demands, which resulted in losses of 51,000 working days.³⁷ Disputes are mainly due to a low coverage of labour inspectors, non-respect for freedom of association, and non-affiliation to trade unions.

TRADE UNION RIGHTS VIOLATIONS

Morocco ranks 3 of 5+ (5+ is the worst ranking) on the 2023 Global Rights Index, linking with workers who are challenged by “regular violations of rights”, i.e., government and/or companies are regularly interfering in collective labour rights or are failing to guarantee these rights fully. There are also deficiencies in laws and/or specific practices, making frequent violations possible. Morocco has stayed on this ranking since 2015.³⁸

ITUC registered four cases of regular violations of rights from 2020 to 2022 concerning violations of union rights more frequent; Morocco factory workers forced to renounce union or lose jobs; systematic dismissal of trade union leaders; proposed legislation to limit the right to strike.³⁹

Two issues emerged in 2023. Firstly, precarious working conditions are prevalent in the agricultural sector, where around three out of four employees operate without a contract and social security coverage. The legislation even discriminates against farm workers, visualised in twisted wage and employment regulations: inter-professional guaranteed minimum wage is higher than in the agricultural sector, and agricultural workers have more extended workdays than other workers (see more in the Working Conditions section). The

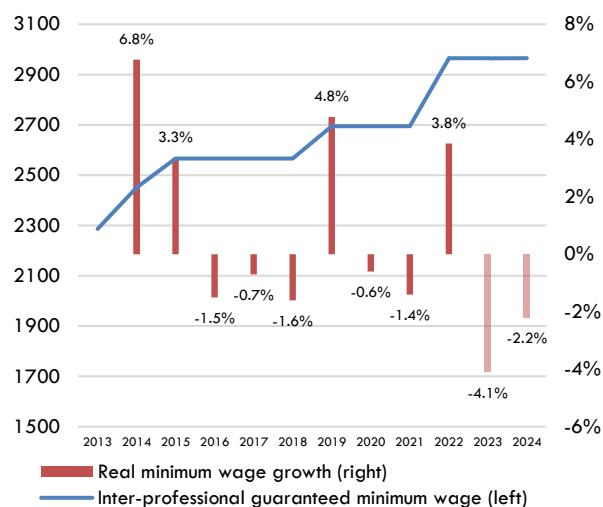
government aims to adjust these disparities but is not expected to be resolved until 2028. Secondly, the education sector has turned into an urgent issue. In 2023, representatives of more than 100,000 teachers and interim workers at the Ministry of Education organised several strikes. They brought public schools and colleges to a standstill, demanding recognition as civil servants. Approximately, 40% of the Ministry’s workers are hired temporarily. Some have been in this situation for more than 15 years.⁴⁰

Around 85,000 people are living in modern slavery in Morocco, ranking as number 121 out of 167 countries on the Global Slavery Index (1 is the worst score).⁴¹ 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.

WORKING CONDITIONS

Morocco introduced the Guaranteed Interprofessional Minimum Wage (SMIG) in the early 1980s to guarantee workers’ income. In 2022, tripartite social dialogue reached the latest agreement of the nominal minimum wages to increase by 10% on average from 2021 to 2022, reaching Dirham (MAD) 3,500 (US\$344) in the public sector, MAD 2,665 (US\$292) in the private sector, and MAD 2,531 (US\$249) in the agricultural sector. It reflects a minimum wage gap of 15% between the inter-professional guaranteed minimum wage and the agricultural sector. The real minimum wages (deducted inflation) also grew by 11% on average during the 2010s but down to 1.8% from 2020-2022 due to the Covid-19 pandemic and inflation hike (see more in Figure 2). The country’s minimum wage scale ranks higher than the other Northern African countries. Apart from the minimum wage, the country has no statutory wage laws.

Figure 2: Monthly inter-professional guaranteed minimum wage and its yearly real growth in Morocco, 2013-2024



Source: Statista; own calculation of real minimum wage.

The informal economy is widespread in Morocco creating loopholes in labour and business regulations, including avoiding the minimum wage. Besides, women make 30% less than their male peers.

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. Employers often apply temporary contracts to discourage employees from joining or organising unions. This situation has challenged industrial relations; for instance, several strikes in 2023 brought public schools and colleges to a standstill.

Labour inspectors increased by 77%, from 282 in 2020 to 500 in 2022. The government further launched a new labour inspectorate information technology management system, enabling remote training sessions for inspectors in compliance with pandemic countermeasures. However, the number of labour inspectors remains insufficient for the size of Morocco's workforce, including more than 11 million workers. According to the ILO's technical advice of a ratio approaching one inspector for every 15,000 workers in industrialising economies, Morocco would need to employ about 797 labour

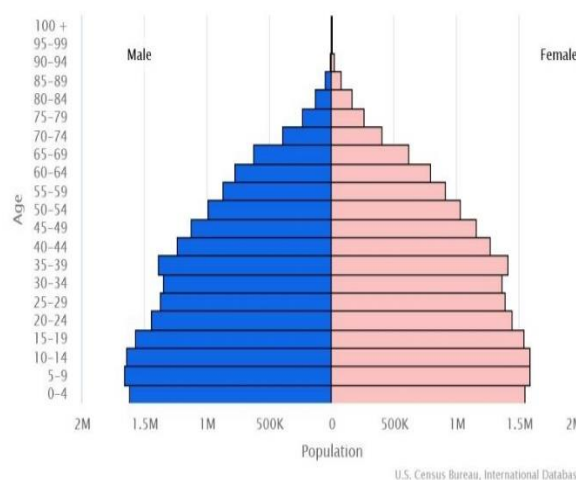
inspectors.⁴² Penalties were generally not sufficient to deter violations.

WORKFORCE

Morocco is known as a tolerant, multicultural, and stable country, but it masks underlying social tensions and an unequal society. It is reflected in persistent social and economic gaps: a large population segment still has limited education, financial resources, or access to social insurance protection and sanitation.⁴³

The country's population growth gradually fell from 2.6% in 1980 to 1.0% in 2022. The population reached about 37 million in 2023. The fertility rate (births per woman) fell from 5.7 in 1980 to 2.3 in 2021. The life expectancy rate increased from 55 years in 1980 to 74 today. Figure 3 below visualises that the youth bulge has entered an initial phase, which is characterised by a transformation of the population structure by age (drop in dependence ratio). Instead, Morocco faces the looming challenge of an ageing population: Population 60+ is projected to reach 30% of population in 2050, with mounting financial pressure on social protection such as health and eldercare pensions. Currently, about 26% of the population is below 14 years, 66% the working age (15-64), and 8.1% is above 65 years.

Figure 3: Morocco's population pyramid based on Age-Sex structure, 2023



Source: Central Intelligence Agency, The World Factbook, Morocco.

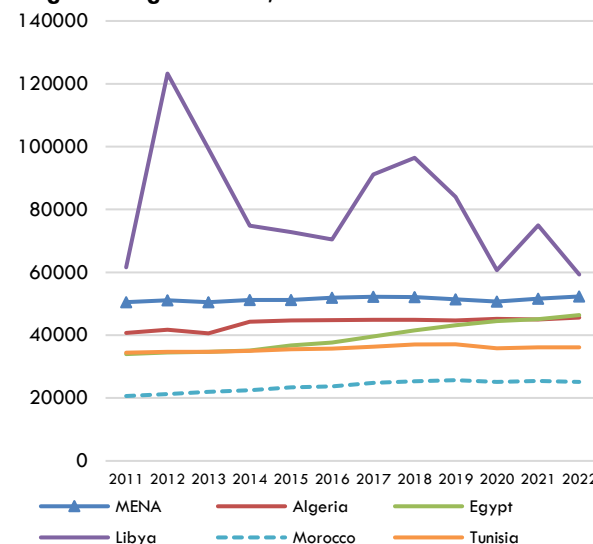
The latest national labour force survey data shows that around 25.5 million Moroccans represented the working-age population. The labour force participation rate descended four percentage points in the last decade, reaching 45% of the working-age population in 2021. Men's share of the total employment covers 78%. In contrast, women represent 22%. Men drove the minor employment growth of 2.5% from 2011 to 2021, while it significantly fell for women by 13%; Morocco is one of the few countries in the MENA region where women's participation rates are declining (see more in the Gender sub-section). The youth employment group (15-24 years) also fell deeply by 47% in the same period, representing just 9% of the total employment in 2021, linked with improved school enrolment rate at the higher education level and curbing the youth bulge (see more in the Education and Youth sections).

Studies revealed that formalisation has progressed in Morocco: There were 600,000 more wage-earners in the formal sector in 2019 than in 2010.⁴⁴ In sectoral distribution, approximately 44% of Morocco's working population was employed in the service sector; the agriculture sector with a share of 33%, and the industrial sector attracted 23%. Morocco's manufacturing employment proportion of total employment has been stable during the last decades at 11%, challenging the SDG target dealing with growth for this group (see Appendix Table 5, Indicator 9.2.2).

Figure 4 shows that Morocco's labour productivity slowly grew during the 2010s, mainly benefitting some high-value-added industries like renewable energy, aeronautics, the automotive industry, and electronics. It has led to the localised creation of more high-end jobs; for the most part, spillovers to other sectors and other areas of the country have been limited. This situation is reflected in the country's labour productivity being still relatively low compared with the neighbouring Northern African countries. It lost pace at the beginning of the 2020s due to the Covid-19 pandemic impact. The relatively low labour productivity concerns an economic and employment structural inertia linked to a volatile agricultural sector a poorly and weak

integrated industrial and service sector. Labour market rigidities and informality also contest a higher boost in labour productivity.

Figure 4: Output per worker trend for Morocco and neighbouring countries, 2011-2022



Note: Output per worker is based on GDP constant 2017 international \$ at PPP. Brunei Darussalam is not included, representing international \$ 130,083 in 2022.

Source: International Labour Organization, Key Indicators of the Labour Market (KILM).

Morocco's labour share of national income peaked at 49% in 2012, slowly falling, reaching 44% at the end of the 2010s. It is slightly higher than other Northern African countries, except superseded by Tunisia. The real wage growth (revisit Figure 2) saved Morocco's position compared to neighbouring countries. A transformation involving the rising power of new technology, Just Transition, and still a high informal economy questions Morocco's capacity to reach the SDG dealing with better equality (see Appendix Table 5, Indicators 10.4.1).

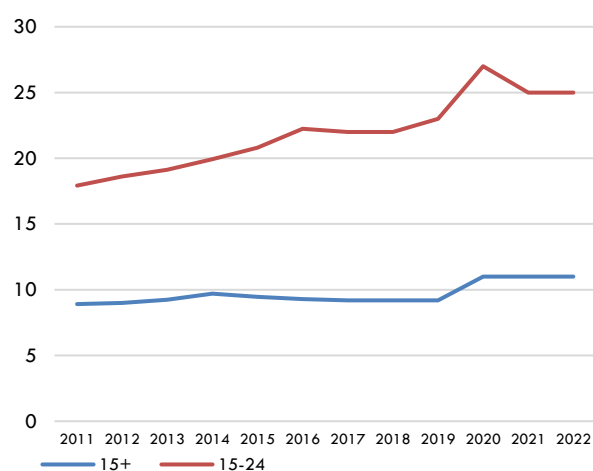
The private sector is dominated by Micro, Small, and Medium Enterprises (MSME), representing around 95% of private businesses and contributing 40% of GDP. Many MSMEs need help to obtain loans; for instance, only 6% of domestic micro-enterprises have access to the necessary financing. MSMEs often sideline labour and business regulations due to a lack of awareness and/or incentives for formalisation.

Unemployment

Morocco's Labour Force Surveys show that the unemployment rate has been steady during the last decade, just below 10% during the 2010s. However, it had a slight upsurge at the beginning of the 2020s, especially among youth as an impact of the global Covid-19 pandemic. The rate is significantly higher than the world's lower-middle income average of 6.4%.

The youth unemployment rate gradually grew during the 2010s, skyrocketing to 27% in 2020, eleven percentage points higher than the world's lower-middle income average of 16% (see Figure 5). The worrisome upwards trend of Morocco's youth unemployment rate shows that the labour market is not generating sufficient new jobs. It encourages a high labour emigration, with a disproportionate impact on skilled workers and a negative effect on the evolution of the middle class.

Figure 5: Unemployment trends in Morocco, Total and Youth, %, 2011-2022



Source: International Labour Organization; Statista.

Unemployment is mainly an urban phenomenon for youth and is concentrated among workers with intermediate and advanced levels of education. Subsistence farming is occupied during planting and harvesting but not engaged full-time throughout the year, creating some "disguised unemployment."

A large segment of workers operates in the informal economy with a weak linkage to unemployment insurance schemes. Since the formal sector is not

providing sufficient new jobs, most workers are pushed to generate some income through casual informal activities, often by lower hours, to survive. It is worth mentioning that unemployment is statistically a part of the employed group, excluding persons outside the workforce. Around 55% of the working-age population in Morocco was projected as economically inactive in 2021, hiding large potential unemployment.

Migration

Morocco is at the heart of migration between Europe, Africa, and the Middle East. It has been considered a country of departure for Moroccans and the entrance of transiting refugees and migrants. The migration landscape is becoming more mixed, supported by growing seasonal and climate migration.

The country has ratified three of four ILO migrant-specific instruments: The Migration for Employment Convention (C097), the Migrant Workers Convention (C143), and the Labour Relations Convention (C151) (revisit Appendix Table 9). It has been a forerunner in Northern Africa to enact migration and asylum reform. The 2011 constitution introduced provisions regarding the non-discrimination of foreign migrants and protecting their rights. Moroccan policymakers further improved the migration and integration policy by developing and implementing a National Strategy on Migration and Asylum (SNIA), launching two regularisation campaigns in 2014 and 2017, and creating a new counter-trafficking law.⁴⁵ It brought the management of entry and residence of workers and their families more in line with the international standards. However, discrepancy continues between Moroccan national legislation and commitments to international legal frameworks; for instance, SNIA casts doubts on its approach to curb the very vulnerability of entering migrants and refugees.⁴⁶

Many Moroccans migrate to improve their job opportunities and income diversification, higher earnings, and social aspirations to follow their family members, marriage, education, or shock

responses such as climate change. Especially young people are attracted to move from rural areas to urban zones, driven to find better jobs in manufacturing and construction sectors or even emigrate. In 2021, the country's urbanisation rate reached 64% of the population, which was lower than the neighbouring Northern African countries, except Egypt.⁴⁷ By 2050, it is estimated that almost 75% of Morocco's population will be living in cities.

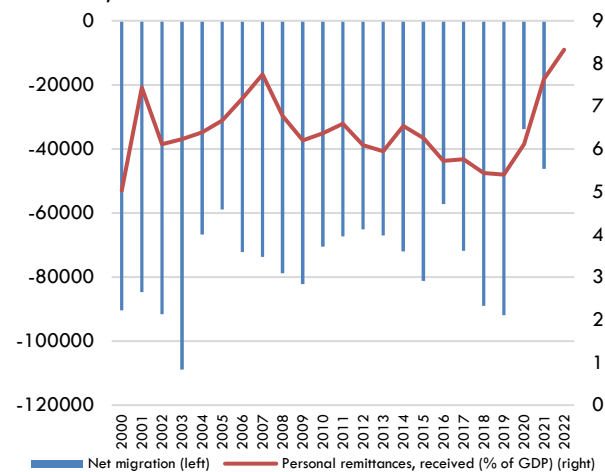
The country has a segment of internally displaced persons (IDPs) from disasters, about 32,000 persons from 2008 to 2022, including 9,500 in 2022. These events were linked with nine disaster events, mainly floods and wildfires.⁴⁸ Although refugees were a minor group in Morocco of about 10,000 persons in April 2023 compared to other MENA countries' scale, the segment is growing fast.

Morocco ranks second among the top remittance recipients in the MENA region, supported by economic activity in the euro area, where many Moroccan expatriates reside, particularly in France, Spain, Belgium, and the Netherlands. During the last two decades, it peaked by 8.3% of GDP in 2022, superseding both tourism receipts and foreign direct investments inflows, not to mention 6.6 percentage points higher than the MENA average at 1.8% (Figure 6).⁴⁹ In the major destination countries, a large share of Moroccan migrants are mobile and could return to their country. Those who choose to return do not seem to encounter difficulties reintegrating into Moroccan society.⁵⁰

As indicated, Morocco has evolved into a major emigration hub. It has, by far, the largest number of emigrants compared to other countries in Northern Africa. Europe is the primary destination for Moroccan migrants, representing one of the largest and most dispersed non-Western migrant communities in Western Europe. This situation is reflected in the unbalanced net migration flow, supporting more leaving than entering. For example, it has led to a critical brain drain. For example, about 3,700 doctors and engineers leave the country yearly.⁵¹ Figure 6 shows the scope of this unbalanced net migration; it stood relatively high but dwindled at the start-2020s due to the

Covid-19 pandemic. The Moroccan exodus is propelled by Moroccan jobseekers looking for better jobs, higher wages, and to avoid the relatively high youth unemployment (revisit Figure 5).

Figure 6: Net migration and personal remittance in Morocco, 2000-2022



Source: The World Bank, World Development Indicators.

Bilateral labour agreements were made with several countries, including France, Italy, and Spain. Although these agreements ensure that migration takes place by agreed principles and procedures, they have various gaps, such as gender concerns are almost absent, and no apparent attention given to the specific problems of low-skilled migrants. In addition, labour social partners have weak participation in migration issues.⁵²

A significant growth in the number of migrants arrived in Morocco. According to the International Organization for Migration, more than 102,000 migrants live in Morocco as of 2020, which accounts for 0.3% of the total population. Most come from sub-Saharan Africa.⁵³ Other organisations argue that at least 700,000 migrants reside in Morocco, mostly in cities lacking legal statuses.⁵⁴ The working rights and access to social services coverage among migrant workers has been meagre. Recently, the Moroccan Ministry of Health developed a National Strategic Plan for Health and Immigration (2021-2025), including a reference document and an instrument that coordinates efforts to improve migrant health. The public perception of immigrants has reportedly become more hostile.⁵⁵

Informal Economy

The informal economy is widespread in Morocco. Recent ILO studies, which define informal employment as the proportion of workers without access to social security, found that the share of informal employment in total employment reached 80% in Morocco, the highest rate among MENA countries. Informal workers are concentrated in the agricultural sector while slightly less in the industry and service sectors.⁵⁶ At the economic level, Morocco's Central Bank has estimated the informal economy will represent 30% of GDP in 2021.

The root of high informality in Morocco is linked to complex, interrelated factors. The labour market is not generating sufficient formal jobs. Apart from the low social security coverage, even three of five wage employees are still in informality, such as weak contractual working conditions and labour regulations. When the self-employed and family workers are included in the equation, the overall extent of informality becomes much larger.⁵⁷ This situation creates vulnerability; for instance, the informal workers are twice as likely to fall into unemployment or drop out of the labour market than formal sector workers.

Informal employment is concentrated in small firms, hindering their scale and productivity. Also, many Moroccan formal enterprises have no hesitation in using undeclared labour, occasionally or regularly, not to mention ignoring minimum wage requirements. It is a result of the weak labour inspection system coverage. Larger companies outsource numerous activities to undeclared MSME enterprises, making the system even more oblique. It further questions the real impact of Morocco's considerable progress in improving its business environment, reflected in its high ranking on the Doing Business Index. A lack of awareness or incentives keeps many businesses and activities informal, costing the implementation of labour and business regulations. These factors are echoed in the relatively low labour productivity (revisit Figure 4) and tailwind for the high emigration (out-migration) flow (revisit Figure 6).

Informality also loopholes in tax generation, reducing government revenues collected to deliver public goods and services.

The susceptible informal circumstances create challenges to improve industrial relations, unionism, and collective bargaining. Informal workers cannot often correctly advocate for themselves. About nine out of ten informal workers were not members of a professional union, and unions find it challenging to organise informal workers. The complexity of formalising the labour market further links with business climate, unfair competition; insufficient support for entrepreneurship, ease of registration, and flexibility in labour contracts versus security, among others. On the positive side, there are forms of memoranda of understanding at the company level, effectively informal agreements between trade unions and companies.⁵⁸

In 2021, the Chamber of Councillors and the Moroccan Economic, Social and Environmental Council provided a list of recommendations to formalise the status of street vendors. The approach is based on providing social protection and health insurance to such a category of workers as a first step towards formalising the sector. The engagement in the national health insurance and retirement fund is expected to provide the government with the necessary data to better prepare the formalisation plan on a broader scale.

Child Labour

Around 26% of Morocco's population is 0-14 years old. As illustrated in the Population Pyramid, this segment's growth lost pace (revisit Figure 3). Reports argued that the country made "moderate advancement" in its fight against the worst forms of child labour.⁵⁹ Controversy about poor working conditions and child labour has caused many retailers and clothing companies, especially well-known brands, anxious to ensure that basic labour standards are respected during production.

The country ratified central international conventions on child labour, including ILO's two conventions on effectively abolishing child labour

(see Appendix Table 9). It has not yet ratified the African Charter on the Rights and Welfare of the Child.

Although the government has 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. For example, the Labour Code does not apply to children who work in the traditional artisan or handicraft sectors for family businesses with fewer than five employees. Instead, domestic labour was subject to the law on working conditions for domestic workers. A template contract for foreigners was launched in 2019, guarded against child labour.

The government implemented several programmes to improve children's situation, including focusing on girls in the agricultural sector. Social dialogue in efforts to tackle child labour also functions, including teachers' unions involved in tripartite institutions. Overall, the scale of programmes targeting child labour could benefit from being revised to address the extent fully, not to mention the authorities did not systematically inspect workplaces or enforce sanctions against child labour. Children's safety, health conditions and wages were often substandard.⁶⁰

The root of child labour is linked with household poverty, low parental education, social norms, lack of access to education or enforcement of compulsory schooling and voided social security. On the positive side, child labour in Morocco fell by 71% during the last three decades, from 517,000 in 1990 to 148,000 children engaged in some form of economic activity in 2021, covering 2.0% of children.⁶¹ It is significantly lower than the Northern Africa and Western Asia average of 7.8%.⁶² A majority of Moroccan child labour is found in rural areas operating in the informal economy, and most are aged 15 to 17. Children in child labour often lack education and are weak or have no access to government services. This group is usually in family settings. It is worth mentioning that child domestic work is a hidden phenomenon that is difficult to tackle because of its links to social and cultural patterns.

Since child labour is concentrated in rural areas, working children are often employed in agriculture, such as 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 rest periods. Some children under twelve are apprentices, particularly in family-owned handicraft workshops. Other work includes fishing, textiles, light manufacturing, and carpet weaving.

Gender

Morocco is considered one of the most liberal and progressive legal frameworks in the MENA region concerning gender equality.⁶³ The country also ratified conventions concerning discrimination and maternity protection. They also signed the Convention on the Elimination of All Forms of Discrimination Against Women (CEDAW) with reservation on Article 2, which limits the application of gender equality; protocol in cases where it conflicts with Islamic law.

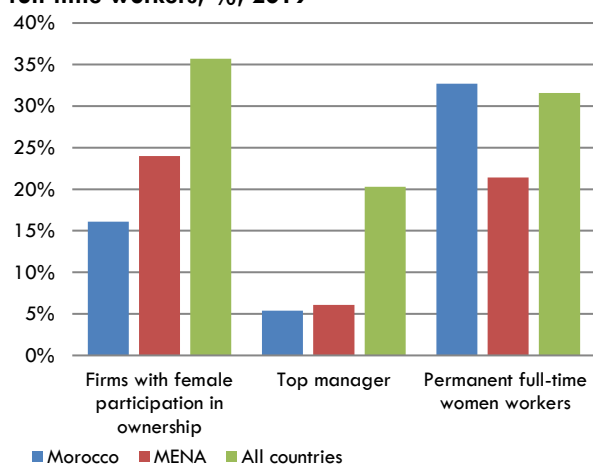
The country's laws and regulations around the life cycle of a working woman scored 76 out of 100 (100 is best) in 2022, higher than the regional average across MENA at 53. The country gets a perfect score regarding laws affecting women's mobility, workplace, and entrepreneurship. When it comes to regulations affecting women's pay, constraints related to marriage, laws affecting women's work after having children, gender differences in property and inheritance, and laws affecting the size of a woman's pension, the country could consider reforms to improve legal equality for women.⁶⁴ It is worthwhile to mention that the prohibition on early and forced marriage may be permitted through a judicial waiver: child marriage (married by 18) was 14% for females, significantly higher than Algeria's 4%.

Morocco also promotes relatively new gender policies: the National Plan for Gender Equality III (2022-2026) and the National Strategy for Combating Violence against Women and Girls

(2022-2030). The implementation of these policies is directed at integrating women into the economy.

The country's company culture has 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 exploitation and repression. Traditional and cultural views frequently oppose women's attainment of economic independence and the role of women as financial providers.⁶⁵ It is especially the case in rural communities as men are perceived as providers and protectors of the family; women are perceived mainly as care providers. These gender-cultural aspects are mirrored in results from the latest enterprise survey. Although Morocco had a relatively high rate of firms with women's permanent full-time workers compared to MENA, it was lower regarding their participation in ownership. Women's participation in top management is just as common as the regional average. Although a directive to promote women to higher-level positions in public office has been implemented, these measures did not considerably impact reality (Figure 7).

Figure 7: Enterprise Survey in Morocco, Women participation in ownership, top management, and as full-time workers, %, 2019



Source: The World Bank, Morocco Enterprise Survey, 2019

Table 2 below displays the scope of Morocco's gender gaps in the employment structure. There are significantly fewer women in employment than men, and Morocco is one of the few countries in the MENA region where women's participation rates are

declining. There are differences between urban and rural areas; for example, women in cities have high levels of inactivity – over 80% are not in the workforce. Although women's participation is somewhat higher in rural areas, it has declined. Almost all women in rural areas are employed informally, often in family farms and related activities. In urban areas, participation of women is closely tied to education and family status. Although women working in the cities tend to be relatively well educated, at least half (55%) are employed in informal jobs.⁶⁶ In addition, women face a gender unemployment gap of six percentage points more than men. The agricultural sector remains the leading employer for Moroccan women. Most women further face a 'double burden' pushing many into informal part-time activities linked to time constraints from domestic chores.

Table 2: Key indicators for labour gender gaps in Morocco, 2021

	Men	Women
Employment share	78%	22%
Unemployment rate	11%	17%
Employees rate	52%	47%
Employment growth *	+8.1%	-13%

* Growth from 2011 to 2021.

Source: Morocco Labour Force Survey 2021.

Studies found that about 73% of Moroccan women's work is unpaid. Those who earn get 50% less than men, the largest gender wage gap for the same job and qualification of any sector in Morocco.⁶⁷ 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 have been taken; for example, nearly 1,000 agriculture workers celebrated the first bargaining pact in 2015.⁶⁸ However, several additional steps are required to curb the gender gaps more broadly.

The global Gender Inequality Index (GII) reflects the scope of gender disparities, ranking Morocco 104 out of 162 countries (1 is best) in 2021. This medium ranking is mainly due to the relatively high maternal mortality ratio, the gender gap in the labour force participation rate, and women score less than men concerning the population with at least

some secondary education.⁶⁹ The other Global Gender Gap Index (GGGI) 2022 ranks Morocco 136 out of 146 countries (1 is best). The country scores low in economic participation and opportunity (139), health and survival (131), educational attainment (114), and political empowerment (99).⁷⁰

Youth

Morocco's youth (15-24 years) represent 20% of the population on a slowly dwindling trend and around 9.1% of the employment in 2021.⁷¹

The 2011 constitution included the foundations for the institutionalisation of youth issues, and in 2012 the government declared a manifest interest in young people. A strategic vision of employment 2015-2025 was launched by the Ministry of Employment that seeks to aid the social inclusion of young people's professional integration by creating jobs. Also, the National Integrated Youth Policy 2015-2030, developed by the Ministry of Youth and Sports, deals with activities carried out for young people. The country recently approved the African Youth Charter in 2022 to provide young people with a political and legal framework intended to support the development of youth activities at the continental, regional and national levels in Africa.

The government promotes several employment programmes, fiscal and tax incentives, training of job seekers for young people. These programmes' initiatives are still struggling to curb the increasing youth unemployment (revisit Figure 5). And it is even though the youth employment share of total employment has dwindled from 17% in 2011 to 9% in 2021.⁷² Since the labour market delivers less than 50% of the new jobs required to keep up with the workforce, a central challenge for Morocco is to create more decent jobs. It further supports the relatively high emigration flow, considered one of the youth's solutions to escape unemployment. The National Survey on International Migration in Morocco confirmed that two out of five (40%) youth between 15- and 29 years old wish to leave their homeland due to economic, social, and cultural reasons.

Cultural aspects discourage many Moroccan youths, especially females, leading to withdrawing from employment and becoming economically inactive in the labour market.

Morocco's latest ranking on the Global Youth Development Index was 93 of 181 countries (1 is best) in 2020, a better position among other Northern African countries. The 2023 Global Youth Wellbeing Index ranks the country 16 of 29 countries (1 is best). The Moroccan youth have mixed perceptions about their well-being overall. Despite a low economic opportunity score, 63% of youth surveyed think their living standard will be better than that of their parents.

Those young men and women with a job often work without job security or benefits; for example, close to nine of ten (88%) of the employed youth work without a contract. It suggests that most have activities in the informal economy with underemployment, temporary or part-time, often under poor working conditions. These groups face inadequate training and career opportunities, among those often earning less than the minimum wage compared to the non-youth groups. Another weakness for Moroccan youth is the mismatch between job requirements and graduates' qualifications, reflected in the low labour productivity.

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.⁷³ While the older generations still have confidence in the country's institutions, younger Moroccan are frustrated with the lack of economic and political opportunities.⁷⁴

Other studies found that although some young Moroccans are politically engaged, they are less active in political parties and trade unions. Instead, they show a preference for activism through informal means of participation such as protests and social media.⁷⁵

EDUCATION

Morocco has experienced a rapid expansion in the supply of education services over the last two decades, resulting in impressive improvements in access to education, enrolment, and attainment. On the other hand, the public education system remained stressed by disparities in quality, curriculum and teaching methods, infrastructure, and equipment. In addition, the Covid-19 pandemic brought unprecedented crisis for Morocco's education system, which was similar worldwide.

A long-awaited education framework law was approved in 2019, aiming to increase the quality and accessibility of the education system. A roadmap for the reform of the national education system for 2022-2026 is targeting to reduce by one-third the dropout rate, improving the quality of learning at school by improving the rate of acquisition of basic skills by learners by up to two-thirds, and ensuring that half the pupils benefit from parallel activities instead of one-quarter. The debate also has focused on investing in teacher training and professional development, considered a critical issue for Morocco's education system. Although the form of employment improved in recent years, just 40% of contractual employees were covered in the education sector. Social dialogue has led to an agreement between the Moroccan government and education unions on a unified employment status for national education employees in January 2023. This new status will replace all pre-existing employment arrangements, which means a fresh start for all, contract teachers included, based on new foundations. Nevertheless, in October 2023, thousands of teachers protested for better work conditions and pay. Many have criticized the statute for neglecting demands from unions and teachers and being unfair to teachers and students alike.⁷⁶

Other initiatives to improve the private sector education system concern the contribution rate to providing free-of-charge services for the children of needy families and people with disabilities and the criteria for reviewing registration fees, education, insurance, and services.

The government spending on education in Morocco started to rise in recent years, peaking at 17% of total general government expenditure in 2021. It is still below the range in the 1990s, which was above 20%. The spending stood above the international Education 2030 Framework for Action's benchmark for government financing of education, allocating at least 4% to 6% of its GDP.⁷⁷

Morocco's compulsory education lasts nine years, from age 6 to age 14. Data show a transition rate from primary to lower secondary general education stood at 92% in 2020.⁷⁸ The youth literacy rate increased from 70% in 2004 to 98% in 2018, superseding the Middle East & North Africa average of 90%. On the other hand, dropping out of school emerged as a problem in Morocco. Media noted in the 2021/2022 school year, more than 300,000 Moroccan pupils dropped out of school. Poverty has been a main factor along with early marriage and child labour.⁷⁹

There is a contrast between high education spending and poor educational outcomes. The country's Labour Force Survey data from 2021 revealed that at least one of two (53%) in total employment by education had less than basic education, haunted by a large group of people above 25 years old who have never been to school. There are significant positive shifts in employment by education among the youth segment, which is getting better educated. It is worth mentioning that women in employment are relatively better educated than men (see more details in Table 3). Higher education is not a straightforward path to better jobs, exemplified by the relatively high youth unemployment rate and widespread informality.

Table 3: Employment by education in Morocco, % of employment distribution, age 15+, 2021

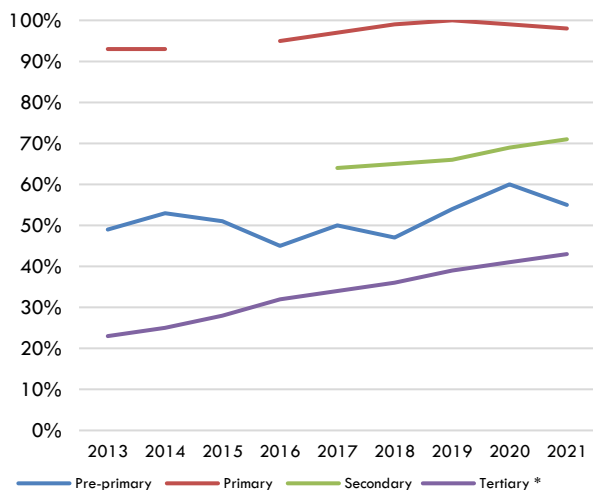
	Less than basic	Basic	Intermediate	Advanced
Total	53%	28%	12%	7.8%
Men	51%	31%	11%	6.3%
Women	53%	16%	13%	13%

Source: International Labour Organization's KILM using data from Morocco 2021 National Employment Survey.

Figure 8 visualises that Morocco's education school enrolment trends have increased during the last

decade at all levels. For example, the country fully reached the net enrolment at the primary education level at the end of 2010, but with a slight downturn at the beginning of the 2020s due to the Covid-19 pandemic. Generally, education policies focused on restructuring higher education levels, which led to remarkable upsurges during the last decade.

Figure 8: Net school enrolment rates in Morocco, %, 2013-2021



* Gross enrolment.

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: United Nations Educational, Scientific and Cultural Organization, *Institute for Statistics*.

As previously indicated, Morocco's education system is struggling to improve its quality. It is partly due to the shortage of qualified teachers; for example, the growth of the public university student population has significantly outpaced that of permanent instructors in recent years. Recent PISA results show that the performance of 15-year-old students in Morocco is significantly below the participating MENA countries average and represents nearly four years of lost schooling compared to the Organisation for Economic Co-operation and Development (OECD) country average.⁸⁰ Access to education is also an issue in rural areas; for example, girls are particularly affected, with many families preferring to keep their daughters at home to help with household chores or marry them off at a young age. The country's education system has been criticized for its outdated curriculum and teaching methods that do not encourage critical thinking or creativity,

essential skills in today's rapidly changing world. Although the government has made progress in promoting girls' education, there is still a significant gender gap in enrolment and achievement.

Vocational Training

Morocco has a long history in vocational training, including a Professional Training Tax that has existed since 1974, and it was connected in the 2011 constitution. The education framework law of 2019 outlines measures facilitating access to vocational training for students in lower secondary and improving training for those pursuing it in qualifying secondary education. Initiatives promote that each of Morocco's twelve regions will host a professional training cluster tailored to meet the labour needs of the surrounding region.

The central national policies and strategies that promote the Technical and Vocational Education and Training (TVET) sector are the National Strategy for Vocational Training (2016-2021), which was not consulted by trade unions. Also, the National Employment Strategy (2015-2030) involves a wide range of actors at both central and local levels, including social partners. Currently, the Ministry of National Education and Vocational Training promotes Morocco's Vocational Training Road Map geared toward a more agile and market-oriented vocational education sector.

The principal actors in the TVET sector can be divided into three main categories:

- State Secretariat for Vocational Training, a ministerial entity responsible for coordinating general policies on vocational training, focusing on planning, guiding, and evaluating the strategies implemented to promote the system.
- Numerous training actors deliver TVET courses, including the state-run Office for Professional Training and Employment Promotion, covering about 76% of all professional trainees enrolled.
- Strategic partners such as organisations, branches, professional corporations and other associations and actors of civil society.⁸¹ For

example, initiatives led to making the TVET systems more demand-driven used by public-private partnerships in the automotive sector in Morocco.

Central trade unions are members of the Management Committee of the tripartite Office for Vocational Training and the Promotion of Work. It provides information and guidance, and recruitment for TVET. It is further responsible for the organisation and monitoring of apprenticeships. Recent studies found that social partners, trade unions, industry skills councils, and other such bodies find it difficult to mobilise human, financial, and organisational resources needed to fully participate in TVET management as envisaged by the legislation.⁸²

Although trade unions have underestimated TVET and skills development due to insufficient specialists in this sector and training methodology, initiatives are emerging at the enterprise level; for instance, in collective agreements between employers and unions as well as special training contracts.⁸³

Non-formal TVET is faintly introduced in the strategic vision 2015–2030, mentioning validation of learning outcomes from experience. In past years, learning outcomes from experience have benefited from innovative projects and initiatives in sectors with high demand for qualified labour. However, there is no general framework approach and procedures accessible to all.⁸⁴

Firms (excluding micro-enterprises) offering formal training programmes increased fast during the 2010s, reaching 36% of firms, significantly higher than the Middle East & North Africa average at 22%.⁸⁵ Formal firms continue being a small group compared to the widespread informal micro and small enterprises, left without a voice in TVET. Studies argued that Morocco has tried to increase the direct client power of employers by making the training provider a subsidiary of an industry association.⁸⁶

Based on the latest available data, about 433,000 vocational pupils were registered, located in 2,042

schools in Morocco.⁸⁷ The share of all Moroccan students in secondary education enrolled in vocational programmes grew from 6.1% in 2010 to 8.6% in 2019, which was lower than MENA's average at 11%.⁸⁸ Nevertheless, it suggests that Moroccans are becoming more interested with TVET education and boosted by the National Strategy for Vocational Training (2016-2021).

Concerns of the TVET system linked with training TVET teachers lack experience in their vocational sectors, not to mention curricula occupational standards often were not implemented; for instance, enterprises must settle for training provision which often falls far short of their expectations.

Fourth Industrial Revolution

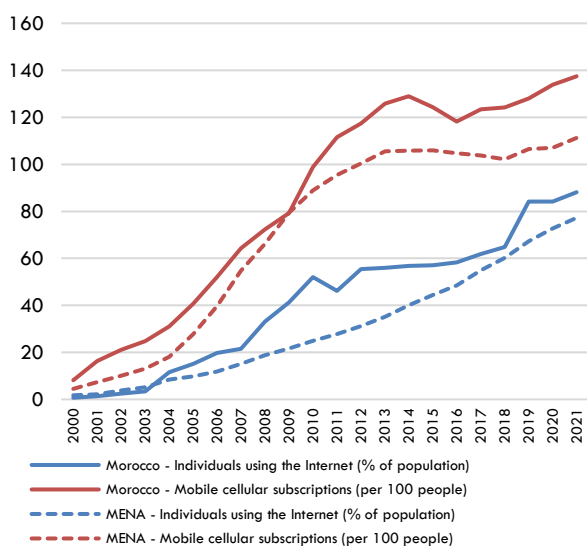
The Fourth Industrial Revolution (4IR) introduces disruptions in the labour market: job losses due to digitisation are becoming more urgent, and upskilling and retooling are putting pressure on the TVET system. In Morocco, a digital transformation evolved over the past decade, helped by combining private sector innovation and government programmes. The government operates with Horizon 2025, a five-year roadmap programme that aims at establishing digitisation of citizen and administrative services, not to mention bridging the digital divide by training 50,000 young people to work in education, health, agriculture, and handicrafts.

Currently, the country ranks among the top three in Africa on the UN Online Service Index, as well as positions 101 of 191 (1 is best) countries via E-Government Development Index (EGDI), demonstrating positive development patterns. Although Artificial Intelligence (AI) also surfaced, gaining an accelerating interest to form a policy in this area, it still lags the leading AI countries in the region like Turkey and the United Arab Emirates.⁸⁹

As indicated, during the last two decades, Morocco's population has experienced a growing application for Information Communications and Technology (ICT) factors. Figure 9 shows that individuals using the internet increased fast, landing

eleven percentage points above the MENA average. The country's demand for mobile cellular subscriptions also soared, again significantly higher than the region's average.

Figure 9: Individuals using the Internet (% of population) and mobile cellular subscriptions (per 100 people) in Morocco and Middle East & North Africa, 2000-2021



Source: The World Bank, World Development Indicators.

The ICT and the Business Process Outsourcing (BPO) industry are in progress in Morocco. The ICT sector generates 6% of GDP, representing about 1.5% of the global outsourcing market. The country was ranked as Africa's leading nation in the BPO sector based on private and public investments. However, a mounting higher cost structure has led other countries to become more competitive such as Tunisia and Egypt.

The Ministry of Industry, Trade, Investment, and the Digital Economy regulates the ICT sector. Initiatives promoted the BPO sector, which employed approximately 130,000 people in 2022 and is projected to create about 10,000 jobs yearly. An ongoing programme like the offshores self-entrepreneurs programme targets training 200,000 young people over four years to be autonomous entrepreneurs. The call centre industry has turned into a vibrant area of trade union activity.⁹⁰

SOCIAL PROTECTION

The social protection system is progressing in Morocco and supported by efforts to implement the 2011 constitution's Article 31, providing the right to healthcare; social protection; to medical coverage. The country has ratified four of ILO's fifteen up-to-date ILO Social Security conventions (C102, C131, C176, and C183 – see more details in Appendix Table 9). However, the social protection system remains challenged by the fragmented legal framework, exemplified by the pension coverage links with the employees and sidelines workers from the informal economy.

The Integrated Public Policy Project for Social Protection 2020-2030 was launched in 2019. It led a new legal framework on social protection in 2021, which has been considered one of the most relevant milestones for the social protection extension of Morocco. Based on a strategic plan for social protection aimed at accelerating the implementation of the major structural reforms, such as:⁹¹

- By the end of 2022, broadening the base of beneficiaries of the generalisation of compulsory health insurance (AMO), including vulnerable categories such as self-employed and non-salaried professionals.
- The generalisation of family allowances by 2023/2024, enabling households not receiving these allowances to receive benefits covering child-related risks or lump-sum benefits for protection against child-related dangers (school drop-out) for 7 million school-age children.
- Broadening the pension schemes coverage in 2025 to include around 5 million employed people and not receiving a pension by having self-employed professionals and informal economy workers.

Main public governance institutions of social protection are: i) the National Social Security Fund (CNSS); ii) the Moroccan Fund of Health Insurance (MFHI), managing compulsory health insurance for the public sector and the student; iii) the Social Cover Non-salaried Workers that promotes basic

compulsory health insurance regime for the categories of professionals, self-employed persons, and self-employed persons. Also, the Directorate of Social Protection of Workers is responsible for contributing to developing measures to promote social protection schemes and medical coverage.

During the last two decades, labour tripartite agreements were reached in social protection, unemployment insurance, and medical coverage, including dental care. The social protection system's financing for workers has relied on employee and employer contributions. These agreements have been led to meagre results, though; for instance, just 21% of the Moroccan population is covered by social protection or two out of five (39%) employed are protected in the event of work injury, which is in line with Northern Africa average.⁹² Social safety net programmes have been demonstrated to target the poorest quintile but also with leakages to the richest quintile.

The number of Moroccan persons above retirement age receiving a pension increased by just three percentage points during the last decade, reaching 43% in 2020.⁹³ A controversial pension reform from 2016 introduced 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 protests among workers.⁹⁴ Besides, the Civil Pension Scheme has been facing a deterioration in its demographic ratio for several years. In fact, this went from 2.9 active people per retiree in 2010 to only 1.8 in 2022.⁹⁵

The country has instead demonstrated improvements in the population's health, including universal health coverage (UHC): In the space of one year, 2022, the overall number of people insured by the CNSS has increased from 7.8 million people to at least 23.2 million (with the affiliation of 3.6 million self-employed workers and their beneficiaries and 9.4 million beneficiaries of AMO programme). Healthcare expenditure financed by private households' out-of-pocket payments reached its lowest level in 2021 but still stood significantly higher than the regional average; both maternal and child mortality rates also dropped.

The country spends around 6.0% of GDP on current health expenditure, in line with Middle East & North Africa average. It reaches the World Health Organization's minimum threshold of 4% of GDP. On the other hand, the country's health expenditure per capita is substantially lower than the region's average (see more details in Table 4).

Table 4: Status of expenditure on health in Morocco and Middle East & Northern Africa (MENA), 2020

Service	Morocco	MENA
Total health expenditure, % of GDP	6.0%	5.9%
Current health expenditure per capita	US\$ 187	US\$ 471
Universal Health Service coverage index (2021)	69 *	-

* Coverage index for essential health services (based on tracer interventions that include reproductive, maternal, newborn and child health, infectious diseases, noncommunicable diseases and service capacity and access). It is presented on a scale of 0 to 100.

Source: The World Bank, World Development Indicators; World Social Protection Report 2017-2019.

Pregnant employees receive 14 weeks of paid maternity leave, seven weeks before birth and seven weeks after. The maternity payment is at the rate of the regular salary rate and paid by the employer. Mothers can also request to take up to a year of additional unpaid leave. The paternity leave benefits three days. Data are scarce on these schemes' coverage.

In 2014, the unemployment insurance scheme emerged in Morocco, excluding self-employed persons. The scheme covers 70% of the insured's average monthly salary in the 36 months before unemployment is paid for up to six months; the maximum unemployment benefit is the legal monthly minimum wage. A limited number of people have benefitted the scheme: The number of beneficiaries has reached 77,826 during 2015-2021, a figure well below the goal of 210,000 beneficiaries.⁹⁶ It shows that the existing system is still inadequate and does not protect unemployed workers well enough (i.e., both the range and the amount are low), not to mention increasing unemployment benefits comes with additional costs. Reports argued that while it might take less time to find a job in the informal economy than in the formal sector, a more supportive unemployment benefits scheme would give workers more time to choose the formal sector

where wages and productivity are higher.⁹⁷ The mentioned new Framework Law on Social Protection seeks the generalisation of unemployment benefit scheme in 2025 to cover all persons in stable employment through the simplification of the eligibility conditions and the extension of beneficiaries.

Subsidies have been an essential part of Morocco's social protection system for decades. It was reformed during the 2010s to curb the subsidy system's financial unbalances. Today, among food products, only a few remained subsidised. However, with the historic rise in food and energy

prices in 2022, state subsidies for essential commodities reached record levels, weighing down on the country's foreign currency reserves, and the trade deficit reached record levels. The international price shock triggered this situation coincided with a severe drought in Morocco that costed the falling agricultural yield, forcing the country to increase its dependency on grain imports. As a net energy importer, it has been more vulnerable to the ongoing price shock in the energy market. Estimations suggest that Morocco spent 5.8% of GDP on energy subsidies in 2022.⁹⁸

APPENDIX: ADDITIONAL DATA

Table 5: 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)	0.1%	2022	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.	38% *	2019	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	15%	2021	Ensure women's full and effective participation and equal opportunities for leadership at all levels of decision-making in political, economic, and public life
8.2.1: Annual growth rate of real GDP per employed person	-0.7%	2020-2022 average	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+)	9.3%	2016	
8.5.2: Unemployment rate (Youth)	22%	2016	
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%	2021	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	46%	2019	Adopt policies, especially fiscal, wage and social protection policies, and progressively achieve greater equality

* Employed covered in the event of work injury.

Source: International Labour Organization, Key Indicators of the Labour Market (KILM).

Table 6: List of approved labour related legislations in Morocco, 2019-2022

Type of legislation	Legislation
2019	
General provisions	Décret n° 2-19-887 du 13 novembre 2019 pris pour l'application des articles 11 et 12 de la loi organique n° 128-12 relative au Conseil économique, social et environnemental.
	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.
Equality of opportunity and treatment	Guide national du dépistage à visée diagnostique de l'infection à VIH.
	Plan stratégique national de lutte contre le SIDA (Plan d'extension 2023).
	Plan stratégique de l'Association de lutte contre le sida (2019-2023).
	Politique nationale intégrée de la santé de l'enfant à l'horizon 2030.
Education, vocational guidance and training	Loi-cadre n° 51-17 du 9 août 2019 relative au système d'éducation, de formation et de recherche scientifique.
	Décret n° 2-19-16 du 23 juillet 2019 pris pour l'application de l'article 5 de la loi n° 80-12 relative à l'Agence nationale d'évaluation et d'assurance qualité de l'enseignement supérieur et de la recherche scientifique.
Seafarers	Loi n° 76-18 du 13 décembre 2019 modifiant et complétant l'annexe I du dahir du 31 mars 1919 formant Code de commerce maritime.
2020	
General provisions	Décret n° 2-20-330 du 18 avril 2020 portant prorogation de la durée d'effet de l'état d'urgence sanitaire sur l'ensemble du territoire national pour faire face à la propagation du corona virus - covid 19.
	Décret n° 2-20-293 du 24 mars 2020 portant déclaration de l'état d'urgence sanitaire sur l'ensemble du territoire national pour faire face à la propagation du corona virus - covid 19.
	Décret-loi n° 2-20-292 du 23 mars 2020 édictant des dispositions particulières à l'état d'urgence sanitaire et les mesures de sa déclaration.
Freedom of association, collective bargaining and industrial relations	Loi n° 08-19 du 11 décembre 2020 modifiant et complétant la loi n° 38-12 portant statut des chambres de commerce, d'industrie et de services.
Equality of opportunity and treatment	Guide suivi et d'évaluation de la riposte nationale au VIH/SIDA (2020-2023).
Social security (general standards)	Loi n° 72-18 du 8 août 2020 relative au dispositif de ciblage des bénéficiaires des programmes d'appui social et portant création de l'Agence nationale des registres.
Specific categories of workers	Loi n° 50-17 du 25 juillet 2020 relative à l'exercice des activités de l'artisanat.
2021	
General provisions	Loi-cadre n° 50-21 du 26 juillet 2021 relative à la réforme des établissements et entreprises publics.

	Loi n° 50-20 du 14 juillet 2021 relative à la microfinance.
	Plan stratégique national de santé et immigration (2021-2025).
Equality of opportunity and treatment	Guide national de prise en charge de l'infection à VIH chez l'enfant. Rapport national Sida (2021).
Social security (general standards)	Décret n° 2-20-935 du 27 juillet 2021 modifiant et complétant le décret n° 2-77-551 du 4 octobre 1977 fixant les modalités d'application du régime collectif d'allocation de retraite (régime général). Décret n° 2-20-936 du 27 juillet 2021 modifiant et complétant le décret n° 2-92-927 du 7 janvier 1993 fixant les modalités d'application du régime collectif d'allocation de retraite (régime complémentaire).
Seafarers	Décret n° 2-20-581 du 25 mars 2021 pris pour l'application de certaines dispositions de l'annexe I du dahir du 31 mars 1919 formant Code de commerce maritime, en ce qui concerne les navires de pêche maritime.
Specific categories of workers	Loi n° 39-21 du 26 juillet 2021 complétant le dahir n° 1-58-008 du 24 février 1958 portant Statut général de la Fonction publique. Loi n° 54-19 du 14 juillet 2021 portant Charte des services publics.
2022	
General provisions	Loi-cadre n° 06-22 du 9 décembre 2022 relative au système national de santé.
Elimination of child labour, protection of children and young persons	Loi n° 49-21 du 17 février 2022 portant approbation de la Charte africaine de la jeunesse, adoptée à Banjul (Gambie) le 2 juillet 2006.

Source: ILO, NATLEX, Morocco, 2019

Table 7: 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.

Table 8: Morocco's key economic data, projections, 2019-2024

Values	2019	2020	2021	2022	2023	2024
GDP (current, US\$)	129bn	121bn	142bn	131bn	147bn	157bn
GDP per capita (PPP, US\$)	8,870	8,256	9,226	9,900	10,408	10,926
Total investment (% of GDP)	30%	29%	30%	30%	30%	30%
Gross national savings (% of GDP)	27%	27%	28%	27%	27%	27%
General government expenditure (% of GDP)	27%	34%	31%	32%	33%	32%
Government gross debt (% of GDP)	60%	72%	69%	71%	70%	69%

Source: International Monetary Fund, World Economic Outlook Database, October 2023.

Table 9: 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
Occupational safety and health	C155 - Occupational Safety and Health Convention, 1981	Not ratified
	C187 - Promotional Framework for Occupational Safety and Health Convention, 2006	2019
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
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 promotes a well-regulated and well-functioning labour market. Per July 2020, there were 85 up-to-date conventions listed.

Source: International Labour Organization, NORMLEX, Country Profiles: Morocco.

Table 10: Central legal reservations concerning the rights to organise, collective bargaining, and strikes in Morocco, 2023

Right to organise
<ul style="list-style-type: none"> • The Labour Code permits anti-union discrimination. • Formalities or requirements that excessively delay or substantially impair the free establishment of organisations. • Restrictions on the right to elect representatives and self-administer in full freedom. • Administrative authorities' power to unilaterally dissolve, suspend or de-register trade union organisations. • Civil servants and officials, who in the exercise of their duties, are required to use weapons, in addition to police officers and members of the armed forces, do not enjoy the right to organise. • Members of the judiciary are barred from forming trade unions. • The Labour Code does not cover domestic workers, depriving them of the right to form unions. • The Labour Code does not cover agricultural workers, depriving them of the right to form unions.
Right to collective bargaining
<ul style="list-style-type: none"> • Excessive requirements concerning trade unions' representativity or a minimum number of members required to bargain collectively. • Civil servants and officials who in the exercise of their duties are required to use weapons, in addition to police officers and members of the armed forces, do not enjoy the right to organise. This includes prison, lighthouse, water and forestry administration staff, as well as officers and officials who in the exercise of their duties are entitled to use weapons.
Right to strike
<ul style="list-style-type: none"> • Sit-ins are prohibited, and employers can suspend any worker who prevents non-strikers from going to work for seven days. A second offence during the year can lead to a 15-day suspension. • The government can break up demonstrations in public areas held without government permission and can prevent factory occupations. • Excessive civil or penal sanctions for workers and unions involved in non-authorised strike actions.

Source: International Trade Union Confederation, Survey of Violations of Trade Union Rights, Morocco: Legal, September 2023

Table 11: Labour market efficiency in Morocco, 2019

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

* Survey data. ** Ranked by per cent. Note: Rank from 1 to 141 (1 is highest).

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

Table 12: List of professional unions in Morocco

Main professional unions	Year of start	Location
Union marocaine du travail (UMT)	1955	Casablanca
Syndicat National de l'Enseignement Supérieur (SNESup)	1957	Rabat
Union générale des travailleurs du Maroc (UGTM)	1960	Casablanca
Union nationale du travail au Maroc (UNTM)	1976	Rabat
Confédération démocratique du travail (CDT)	1978	Casablanca
Confédération générale du travail (CGT)	2014	Rabat
Other professional unions		
Union des syndicats des travailleurs libres (USTL)	1963	Casablanca
Union des travailleurs marocains (UTM)	1970	Casablanca
Forces ouvrières marocaines (FOM)	1970	Casablanca
Syndicat démocratique du travail au Maroc (SDTM)	1973	Tanger
Union marocaine de l'action (UMA)	1976	Rabat
Union nationale des syndicats des travailleurs libres (UNSTL)	1977	Rabat
Union des syndicats populaires (USP)	1983	Casablanca
Syndicat national populaire (SNP)	1991	Rabat
Union national de l'action (UNA)	1993	Casablanca
Syndicat autonome du travail (SAT)	1995	Casablanca
Confédération générale des travailleurs du Maroc (CGTM)	1994	Casablanca
Syndicat national démocratique (SND)	1996	Casablanca
Union démocratique des travailleurs (UDT)	1996	Rabat
Union des syndicats démocratiques (USD)	1996	Rabat
Commission ouvrières marocaines (COM)	1997	Casablanca
Syndicat de l'action sociale (SAS)	1998	Casablanca
Syndicats confédérés (SC)	1998	Rabat
Organisation marocaine des travailleurs unis (OMTU)	2003	Salé
Fédération démocratique du travail (FDT)	2004	Casablanca
Organisation démocratique du travail (ODT)	2006	Rabat
Syndicat national des ingénieurs marocains (SNIM)	2007	Rabat
Union nationale de l'initiative syndicale libre (UNISL)	2010	Rabat
Union générale marocaine du travail (UGTM)	2013	Tanger

Source: Wikipedia, Syndicalisme au Maroc.

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