



EUROPEAN CLUSTER
COLLABORATION PLATFORM

Country factsheet

Morocco

An initiative of the European Union





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Introduction



This document presents an overview of the cluster policy in Morocco. Given its importance to contextualise the cluster policies (and related) analysed in the factsheets, a comprehensive outlook of the country in socioeconomic terms can be consulted in the Morocco's Economic Update 2020 by the World Bank.

The "Country Snapshot" is a bi-annual update, highlighting the country's recent developments, economic outlook and major overview of the World Bank's partnership with the country.

The COVID-19 pandemic has caused an unprecedented economic shock to the Moroccan and global economy. In response, the Moroccan government has launched an Industrial Recovery Plan 2021-2023, composed of [three strategic projects](#) to reinforce the positioning of Moroccan industry in the aftermath of the crisis. The overarching objectives of the industrial recovery strategy are to support industrial sectors and strengthen their integration, to increase the creation of jobs as well as the development of entrepreneurship, and to position Morocco as a strategic international partner. However, clusters are not directly mentioned in this plan as actors of the recovery.

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National cluster policy, programmes and initiatives



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1. National cluster policy, programmes and initiatives

Policy type:	Broad policy
Policy name:	Industrial Acceleration Plan (IAP) 2014-2020 Industrial Policy
<p>POLICY OBJECTIVES</p> 	<p>Increasing competitiveness and boosting scale up of SMEs</p> <p>Supporting internationalisation activities</p> <p>Enhancing the visibility of clusters</p> <p>Fostering innovation and strengthening innovation ecosystems</p> <p>Promoting entrepreneurship, start-ups and spin-offs</p> <p>Promoting social and sustainable economy and other solidarity-based initiatives</p> <p>Promoting employment and upgrading skills and competences</p> <p>Connect to global supply chains</p> <p>The Industrial Acceleration Plan (IAP) does not explicitly mention the development of clusters, however it strongly emphasizes the reduction of fragmentation and better integration of industry. The aim is the creation of industrial ecosystems of SMEs, including very small businesses and “self-entrepreneurs” (a newly introduced status to reduce informal economic processes), that are grouped around large industrial leaders. In this regard it is dedicated to the reinforcement of value chains, their internationalisation and innovation capacity. The three priorities of the IAP are first, the creation of a more integrated industry, stimulating new dynamics and relationships between big companies, SMEs, very small businesses and self-entrepreneurs; second, enhanced competitiveness of SMEs through the creation of a favourable and supportive legislation which aims at optimising social and economic benefits; and third, internationalisation of Moroccan industry in terms of competitiveness, access to global supply chains and negotiations on Free Trade Agreements. The key objectives for 2020 are increased economic growth of the industrial sector (as share of GDP, from 14% to 23%) and creation of half a million jobs, especially for young people. For the latter skills programme will be generalised with the aim of matching skills to business needs. Therefore, a skilled human resource data bank and inter-contracts pool are put in place.</p>
<p>POLICY FOCUS</p> 	<p>Sectoral</p> <p>The Industrial Acceleration Plan (IAP) focuses exclusively on the development and consolidation of the industrial sector as source of employment and economic growth.</p>



RESPONSIBLE AUTHORITIES 		<p>Both drafting and implementation</p> <p>Oversees the implementation</p> <p>The Industrial Acceleration Plan (IAP) was designed and implemented by the Ministry of Industry, Investment, Trade and digital economy. An inter-ministerial committee is monitoring the implementation of the IAP and it oversees the accomplishment of projects.</p>
BENEFICIARIES 		<p>SMEs</p> <p>Business associations</p> <p>Large firms</p> <p>General population</p> <p>SMEs, large companies and professional associations benefit from their strategic alliance through the integration into an enabling ecosystem and from financial support to increase exports. Such economic interest groupings function as centres of increased economic growth, innovation and employment, which is beneficial for the country's overall economy and the general population.</p>
INSTRUMENTS 	Financial	<p>Funding collaboration initiatives</p> <p>Financing networking events</p> <p>Others: Support for computerisation</p>
	Technical assistance	<p>Infrastructure: coworking spaces, offices, incubation and accelerator spaces, research centres, technology parks etc.</p> <p>Support for hard skill development: knowledge transfer, intellectual property, entrepreneurship, export advice, market intelligence</p> <p>Support for soft skills development: coaching, management training, upskilling/reskilling</p> <p>Support for networking and partnership building (at national and/or international level)</p>
	Explanation	<p>In terms of funding of collaboration initiatives, the Industrial Acceleration Plan (IAP) implements schemes for direct support for economic interest groupings. Such financial support is foreseen for entrepreneurship trainings, mentoring, personalised coaching, partnership networking events, as well as for basic and advanced computerisation. The Plan also facilitates access to finance under a partnership agreement between the state and the banking sector with an integrated and competitive financing offer i.e. competitive rates, support for restructuring and internationalisation as well as consultations. Industrial land (1,000 hectares) is made available for industrial rental parks including a one-stop shop, pool of local workers, ad hoc services and a training package.</p>
	Period	<p>Limited period</p>



HISTORY 	Ending year (<i>for policies with limited period</i>)	2020
	Starting year	2014
	Explanation	The Industrial Acceleration Plan (IAP) is implemented from 2014-2020 period following past efforts of the National Pact for Industrial Emergence 2009-2015.
BUDGET 	Overall	MAD 20 billion (EUR 1,819,521,647.76)
	Annual	-
	Source of funding	The main source of funding is the state budget in form of the Industrial Investment Fund (FDI), which was created along with the Industrial Acceleration Plan (IAP). Its annual budget is not outlined in detail for the public.
POLICY EVALUATION 	Availability	No policy evaluation
	Results	The Industrial Acceleration Plan (IAP) does not mention any form of evaluation. However, in an official press release from 2018, the Ministry of Industry, Investment, Trade and digital economy states that the progressive transformation of the country's industrial fabric under the IAP framework created 288,126 new jobs between 2014 and 2017, which translates into nearly 58% of the 500,000 target for 2020. An update on the webpage mentions the creation of 405,496 new jobs between 2014 and 2018 (ca. 81% of the overall goal).
POLICY ALIGNMENT WITH THE EU PRIORITIES 	Social inclusion	

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State of play of cluster policy



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2. State of play of cluster policy

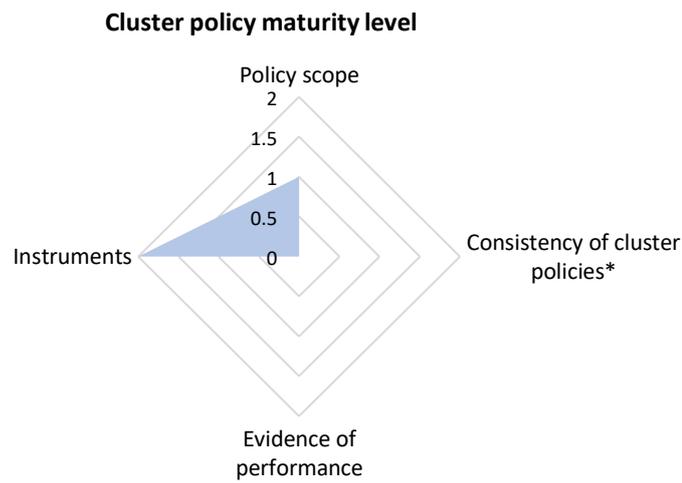
The data below illustrates how the country ranks in terms of maturity of cluster policy. The maturity index is based on a combination of factors presented in Chapter 1 and which are scored based on their existence:

- **Policy scope:** whether the country has a dedicated cluster policy, or cluster creation and/or development is targeted through broader policies (existence of broader policies = 1 point; existence of targeted cluster policies = 2 points)
- **Consistency of cluster policies:** assessment of the duration and experience of the country in doing cluster policies. This dimension assesses only existing cluster policies and not broader policies (no cluster policies available = 0 points; < 10 years of experience or > 10 years (but interrupted) = 1 point; > 10 years (but with clear continuity) = 2 points)
- **Evidence of performance:** the existence of monitoring and evaluation mechanisms determines the degree of policy development in the country (no evaluations = 0 points; existence of evaluations of past policies or in-itinere = 0.5 points; existence of ex-ante and/or ex-post evaluations = 0.5 points)
- **Instruments:** whether the policies provide any instruments to support the policy implementation, being these financial and/or technical assistance (1 point for each type of instrument available)

It is important to note that the maturity does not reflect the performance of a country, but only the degree of development of their cluster policy at the moment when the data was collected (2020). The maturity index illustrates how the country scores for each of these four dimensions (policy scope, consistency of cluster policies, evidence of performance and instruments) compared to the maximum score that they can reach.

	Morocco	Maximum score
Policy scope	1	2
Consistency of cluster policies*	0	2
Evidence of performance	0	1
Instruments	2	2

* This dimension is scored solely if the country has a dedicated cluster policy and it assesses only cluster policies



State of play of cluster policy in the country

No policy evaluation



Policy evaluation (for terminated policies)	<p>The strategy “Maroc innovation 2009-2014” focused on R&D improvement and the promotion of entrepreneurship and innovation as key drivers of competitiveness.</p> <p>The strategy highlighted the need and set the goal of the creation of 15 national clusters. Such development should be supported by enabling environment created through policies e.g. branding to increase their international visibility. The policy encouraged the development of start-ups and spin-offs with financial incentives. Furthermore, it aimed at strengthening the linkage between universities and enterprises. Special financial instruments and funds (e.g. support to clusters fund, “Intilak” for innovative start-ups, “Tatwirk” for industrial enterprises and consortia), as well as technical support from the Ministry of Industry, Investment, Trade and digital economy were put in place to support innovative start-ups and innovative projects of enterprises, which were acting in clusters. The official goal of the strategy was the creation of 200 innovative start-ups and 1000 patents by 2014. However, no official evaluation is available at this point. The ECCP Preparatory Briefing states that five clusters were developed until 2013, but in 2015 three out of them were not active anymore. The Moroccan Centre for Innovation, which was created on purpose for the implementation of the strategy, got dismantled after the end of the policy. The policy was not renewed after 2014.</p>
Policy approach in the country	<p>Policy support for the activities of cluster organisations</p> <p>Cluster approach used directly by national/regional development agencies</p> <p>Specific policies to support cooperation projects</p> <p>Broad-based framework policies to support cooperation effectiveness</p>
Continuity	<p>Despite the lack of a national cluster policy, the National Pact for Industrial Emergence 2009-2015 implicitly lays down the base for future cluster development with the creation of 22 integrated industrial platforms (P2I) for the automotive, aeronautics and electronic industry, which function as reception sites for investors and are either dedicated to one sector or combine several sectoral areas. These new generation industrial parks were implemented under the vision of territorial development and increased industrial growth with public-private partnership. The first explicit approach towards cluster policy in Morocco is outlined in the “Maroc Innovation” strategy 2009-2014. The strategy had the goal of the creation of 15 clusters by the end of the policy and since 2011 annual calls for proposals to support clusters are launched. The policy ended in 2014 and was not renewed but substituted with a broader policy, the Industrial Acceleration Plan 2014-2020. There is no clear reason or statement why the policy was not continued. The annual call for cluster proposals continues to be announced on the homepage of the Ministry of Industry, Investment, Trade and digital economy. Since 2011, 11 clusters were selected and financially supported by the government within this support programme.</p>
Consistency	<p>No cluster policy available</p> <p>Besides broad national innovation and industrial strategies, Morocco does not have a national policy that targets exclusively clusters.</p>

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