



EUROPEAN CLUSTER
COLLABORATION PLATFORM

Country factsheet

Morocco

An initiative of the European Union





Content

| | |
|---|----|
| Introduction | 3 |
| 1. National cluster policy, programmes and initiatives..... | 5 |
| 2. State of play of cluster policy | 10 |
| Bibliography..... | 14 |
| Annex..... | 16 |



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. In addition to the COVID-19 pandemic, the ongoing Russian military aggression against Ukraine has also taken its toll on northern African countries and industrial ecosystems¹.

In the following, a succinct overview of the cluster policy in Morocco will be provided. The structure of this factsheet generally encompasses:

- 1) an overview of the national cluster policy and an insight into the regional cluster policy,
- 2) an assessment of the state of play of the national cluster policy.

¹ Policy Center for the New South (2022): The Economic Implications of the War in Ukraine for Africa and Morocco. Available under: [The Economic Implications of the War in Ukraine for Africa and Morocco \(policycenter.ma\)](#) (last accessed 31.03.2023).

01

National cluster policy, programmes and initiatives



EUROPEAN CLUSTER
COLLABORATION PLATFORM

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1. National cluster policy, programmes and initiatives

In this section we provide an overview of the Industrial Strategy of Morocco. While no cluster specific initiative or strategy is existing on the national level, the Industrial Acceleration Plan 2021 – 2025 aims at strengthening industrial actors in the country and integrate the regions into the transformation process. The breakdown is presented in the form of a table, with the first column showcasing information on the aspects which constitute the policy (beginning with ‘Policy Objectives’, following with ‘Policy Focus’, etc.). The second column represents the case of the Marroquin industrial policy, whilst no cluster policy is available in Morocco.

Within the table the text presented in bold (black) depicts standardised categories across country factsheets (56 in total for 2022), which is applied for the comparative purposes. This is followed by a complementary descriptive text to provide more insights about the industrial policy in Morocco.

| | |
|---|---|
| Policy type: | Sectoral policy |
| Policy name: | 2021-2025 Industrial Acceleration Plan |
| <p>POLICY OBJECTIVES</p>  | <p>Increasing competitiveness and boosting scale up of SMEs</p> <p>Supporting internationalisation activities</p> <p>Fostering R&D activities, technology development and implementation</p> <p>Fostering innovation and strengthening innovation ecosystems</p> <p>Promoting resilience and sustainable economy and other solidarity-based initiatives</p> <p>Promoting employment and upgrading skills and competences</p> <p>Promoting entrepreneurship, start-ups and spin-offs</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 internationalization and innovation capacity. The key objectives for 2025 are the development of research and innovation by promoting new technologies and putting SMEs at the heart of technological transformation. A special focus is on the development and implementation of partnerships of the different regions.</p> |



| | |
|---|---|
| Policy type: | Sectoral policy |
| Policy name: | 2021-2025 Industrial Acceleration Plan |
| POLICY FOCUS  | Sectoral focus <p>The Industrial Acceleration Plan (IAP) builds on the achievements made in the previous Industrial Acceleration Plan from 2014-2020. It focuses exclusively on the development and consolidation of the industrial sector as source of employment and economic growth.</p> |
| RESPONSIBLE AUTHORITIES  | In charge of drafting In charge of implementation Oversees the implementation <p>The Industrial Acceleration Plan (IAP) was designed and implemented by the Ministry of Industry and trade. An inter-ministerial committee is monitoring the implementation of the IAP and it oversees the accomplishment of projects.</p> |
| BENEFICIARIES  | SMEs Research organisations Academic institutions Start-ups Business associations Technology centres Large firms General population <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 centers of</p> |



| | | |
|---|---|---|
| Policy type: | Sectoral policy | |
| Policy name: | 2021-2025 Industrial Acceleration Plan | |
| | increased economic growth, innovation and employment, which is beneficial for the country's overall economy and the general population. A special focus is also on the integration of the regions into the industrial developments. | |
| INSTRUMENTS  | Financial | Funding collaboration initiatives Financing networking events |
| | Technical assistance | Infrastructure: coworking spaces, offices, incubation and accelerator spaces, research centres, technology parks etc. Support for hard skill development: knowledge transfer, intellectual property , entrepreneurship, export advice, market intelligence Support for soft skills development: coaching, management training, upskilling/reskilling Support for networking and partnership building (at national and/or international level) |
| | 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, personalized coaching, partnership networking events, as well as for basic and advanced computerization. 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 internationalization 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> |
| HISTORY  | Period | Limited period |
| | Ending year (for policies with limited period) | 2025 |



| | | |
|--|--|---|
| Policy type: | Sectoral policy | |
| Policy name: | 2021-2025 Industrial Acceleration Plan | |
| | Starting year | 2021 |
| | Explanation | The 2021-2025 Industrial Acceleration Plan (PAI) is implemented during a four year period and is the successor of the Industrial Acceleration Plan (IAP) that was implemented from 2014-2020 period following past efforts of the National Pact for Industrial Emergence 2009-2015. |
| BUDGET | Overall | Data unavailable |
| | Annual | Data unavailable |
| | Source of funding | Data unavailable |
| POLICY EVALUATION | Availability | in-itinere |
| | Results | The Industrial Acceleration Plan (IAP) does not mention any form of evaluation. However, an inter-ministerial committee is monitoring the implementation of the IAP and it oversees the accomplishment of projects. |
| POLICY ALIGNMENT WITH THE EU PRIORITIES | Digitalisation Social inclusion | |

Source: ECCP (2022)

02

State of play of cluster policy



EUROPEAN CLUSTER
COLLABORATION PLATFORM

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2. State of play of cluster policy

This section presents an overview on the state of play of the broad policy in Morocco in the form of a quantitative and qualitative assessment. The data below illustrates how the country ranks in terms of **maturity of policy at the national level**. The maturity assessment is based on a combination of factors presented in Chapter 1, which receive a score based on the existence or absence of a given element in the cluster policy. The regional cluster policy example is not included in this assessment.

Note: the maturity assessment does not reflect the performance of a country, but only the degree of development of their national policy at the moment of data collection (Q3 2022). The assessment illustrates how the country scores for each of the four criteria (policy scope, continuity of cluster policies, evidence of performance, cluster support instruments) compared to the maximum score that they can reach. Please refer to the **Annex** for the detailed overview of the categories and the scoring system.

The table below presents an overview of the **maturity assessment for Morocco** for 2022. The total score of Morocco is 2,5 points out of 8.

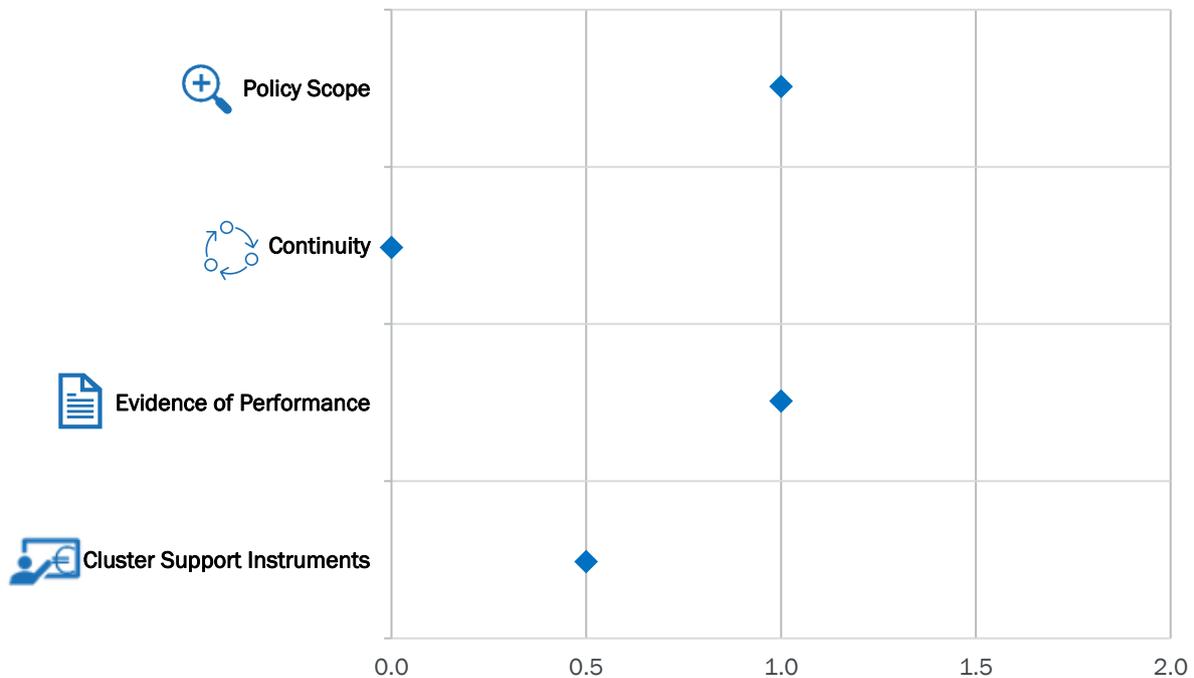
| Morocco | MATURITY ASSESSMENT | Max score | Actual score |
|------------------------------------|---|-----------|--------------|
| POLICY SCOPE | Absence of cluster policy | 0 | |
| | Broad policy | 0,5 | |
| | Sectoral policy | 1 | 1 |
| | National and/or regional cluster policy | 2 | |
| CONTINUITY | No cluster-specific policy available | 0 | 0 |
| | Cluster policy established recently | 0,5 | |
| | Cluster policy established between over 2 and 10 years | 1 | |
| | Cluster policy established over 10 years ago | 2 | |
| EVIDENCE OF PERFORMANCE | No evaluation and / or monitoring available | 0 | |
| | Existence of evaluations of past policies | 0,5 | |
| | Existence of monitoring or an ongoing / interim evaluation | 1 | 1 |
| | Existence of monitoring and ex-ante or ongoing / interim evaluation | 2 | |
| CLUSTER SUPPORT INSTRUMENTS | No instruments for cluster development | 0 | |
| | Financial support for cluster development in the broader and / or sectoral policy | 0,5 | 0,5 |
| | Financial or technical support for cluster development in dedicated cluster policy | 1 | |
| | Financial and technical support for cluster development in dedicated cluster policy | 2 | |
| TOTAL (8) | | | 2,5 |

Source: ECCP (2022)



Drawing from the table above that showcases the scored points in Morocco's broad policy, the Figure below portrays the **degree of maturity** across four categories related to the national level cluster policy.

Figure 1: Maturity of cluster policy - Morocco



Source: ECCP (2022)

The text below provides a qualitative description of the state of play of the cluster policy in Morocco, which is complementary to the maturity assessment presented above.

Policy scope

The 2021-2025 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 internationalization and innovation capacity. The key objectives for 2025 are the development of research and innovation by promoting new technologies and putting SMEs at the heart of technological transformation. A special focus is on the development and implementation of partnerships of the different regions.

Continuity

While no dedicated cluster policy exists in Morocco, the Industrial Acceleration Plan (IAP) proves a certain continuity. Between 2014-2020, the previous Industrial Acceleration Plan was implemented by the Moroccan Ministry of Economy and Trade.



Evidence of performance

The Industrial Acceleration Plan (IAP) does not mention any form of evaluation. However, an inter-ministerial committee is monitoring the implementation of the IAP and it oversees the accomplishment of projects. No official documents are available with regards to the monitoring.

Cluster support instruments

No dedicated cluster support instruments are available in Morocco due to the non-existence of a national cluster policy. 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, personalized coaching, partnership networking events, as well as for basic and advanced computerization. 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 internationalization as well as consultations.

Cross-regional / international cooperation

No Moroccan clusters were part of the any INNOSUP-1 or ESCP consortium. However, it is important to mention that Morocco takes part in the European Neighbourhood Cooperation Policy, and it is part of the Euro-Mediterranean Partnership.

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EUROPEAN CLUSTER
COLLABORATION PLATFORM

Strengthening the European economy through collaboration



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Annex

| Criterion of maturity assessment | Description | Scoring (points between 0 and 2) |
|---------------------------------------|--|--|
| Policy scope | Assessment whether the country has a dedicated cluster policy, or cluster creation and/or development is targeted through broader policies, e.g. foreign trade policies, labour and social policies or specific sectoral policies, e.g. industrial policy tourism policies, agriculture policies | <p>absence of cluster policy = 0</p> <p>existence of broader policies = 0,5</p> <p>existence of specific sectoral policies = 1</p> <p>existence of targeted cluster policies = 2</p> |
| Continuity of cluster policies | Assessment of the duration and experience of the country in carrying out cluster policies. This criterion assesses only existence of targeted cluster policies and not broader policies or sectoral policies | <p>absence of policies supporting cluster development = 0</p> <p>cluster policy established recently (within the last 2 years) = 0,5</p> <p>cluster policy established between over 2 and 10 years = 1</p> <p>cluster policy established over 10 years ago = 2</p> |
| Evidence of performance | Assessment whether there are evaluations of past and ongoing policies and a monitoring system in place. The existence of monitoring and evaluation mechanisms determines the degree of policy development in the country | <p>no evaluation and / or monitoring available = 0</p> <p>existence of evaluations of past policies, e.g. ex-ante = 0,5</p> <p>existence of monitoring or an ongoing / interim evaluation =1</p> <p>existence of monitoring and ex-ante or ongoing / interim evaluation =2</p> |
| Cluster Support Instruments | Assessment whether the policies provide any instruments to support the policy implementation, being these financial and/or technical support | <p>no instruments for cluster development =0</p> <p>financial support for cluster development in the broader and / or sectoral policy = 0,5</p> <p>financial or technical support for cluster development in dedicated cluster policy = 1</p> <p>financial and technical support for cluster development in dedicated cluster policy = 2</p> |

Source: ECCP (2022).