

CREACT  **MED**

CREATIVE MEDITERRANEAN

Cultural & Creative Industries in Morocco

Salient Features

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CREACT4MED



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CREACT4MED engages with CCI players to enhance networking, collaboration, visibility, financial opportunities and market access. Join the CREAT4MED community at: <https://platform.creativemediterranean.org/>

A GENERAL OVERVIEW

Population size: 36.91 million in 2020

GDP per capita: \$3009.24 (current USD) in 2020

GDP: \$112.8 billion (current USD) in 2020

GDP growth rate: -7.1% in 2020 against 2.48% in 2019

Inflation rate: 0.7% in 2020 (consumer prices)

Unemployment rate: 10.15% of total labour force in 2020 (modelled ILO estimate)

Youth unemployment rate: 22.29% of total labour force aged 15-24 in 2019 (modelled ILO estimate)

Female unemployment rate: 10.47% of female labour force in 2019 (modelled ILO estimate)

Female labour force participation rate: 21.59% of female population aged 15+ in 2019 (modelled ILO estimate)

Rank in the Global Gender Gap Index: 144 out of 156 countries (2021)*

Source:

World Development Indicators (WB)- Last Updated: 07/21/2021 (<https://databank.worldbank.org/source/world-development-indicators>)

*World Economic Forum's Global Gender Gap Report 2021 (<https://www.weforum.org/reports/global-gender-gap-report-2021>)

*The countries at the bottom of the ranking have a greater gender gap



Overall Context

Morocco has a stable monarchy. In 2017, social tensions were high because of great inequality, youth unemployment, urban-rural divides and poor access to health care, but the situation began to calm down with increased social spending and the launch of a long-term development plan.

The Moroccan economy was hit hard by the COVID-19 pandemic, experiencing a 7% GDP contraction in 2020. As a result of the fiscal stimulus, budget deficits reached 7.6% of GDP in 2020. Meanwhile, in response to the pandemic, the government has approved a law that sets in motion the universalisation of social protection systems for the entire population. An economic rebound is now underway, with a positive growth rate of 1% in 2021, driven by an increase in agricultural added value (of 20.5%) resulting from abundant rainfall; however, tourism, a relatively large sector, underperformed in 2021, especially in light of the spread of emergent COVID-19 variants (World Bank, 2021)

Key CCI Figures⁺ In Morocco

Morocco is a country with a rich and diverse cultural background. Amongst the country's numerous historic sites, Rabat was designated a UNESCO World Heritage Site in June 2012, whilst the Ministry of Youth, Culture and Communication (MCJS, for its initials in French) has classified 216 historical sites and monuments.

Given the demographic structure of the country, especially the large and fast-growing youth population (70% of the population is currently under 30), creative industries are expected to thrive, as young people are both the main producers and consumers of creative goods and services.

The public budget for culture has increased in recent years, For the year 2021, the operating budget of the culture department of the MCJS amounts to nearly €42 million, compared to €40.6 million in 2020, of which over €25 million euros was allocated to staff expenses and around €17 million dedicated to material and miscellaneous expenses. The investment budget amounted to over €45 million for the year 2021, an increase of 45.45% compared to 2020.¹

¹ Source: Azdem et al. (2022) p.43, with the exchange rate of 0.094 € for 1 DH

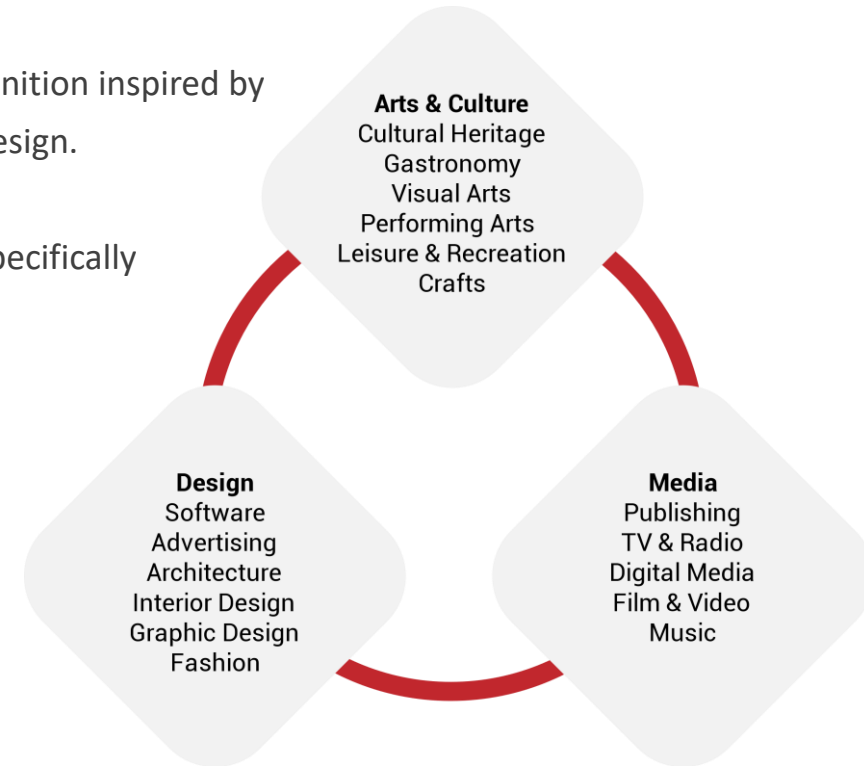


Key CCI Figures⁺ In Morocco (Continued)

There are a number of definitions for CCI in the literature. In this report, we adopt a broad definition inspired by different sources², which classifies the CCI into 3 main groups: Arts and Culture, Media, and Design.

The Moroccan Federation of Cultural and Creative Industries (FICC), established in 2017, has specifically identified 8 key Cultural and Creative Industries (CCI) in Morocco:

- Publishing and booksellers
- Audiovisual
- Cinema
- Visual and graphic arts
- Performing and choreographic arts
- Music and live performance
- Cultural institutions and multidisciplinary spaces
- Event organisation and communication



Source: Own elaboration

The FICC is actively engaged in mainstreaming CCI in Morocco. An example of their efforts was the organisation of the 1st Assises des Industries Culturelles et Créatives, in partnership with the Ministry of Youth, Culture and Communication in October 2019.

² Amongst numerous CCI classifications available in the literature, we are mainly inspired by the ones of UN (EY, 2015), UK (DCMS, 2019), Singapore (ERC-CI, 2002) and the European Commission (EC, 2010)



+ Key CCI Figures In Morocco (Continued)

The traditional cultural sectors include historical heritage and handicrafts, both strong drivers for the tourism industry, and which bring close to 12 million visitors to the country every year. Morocco's cultural heritage is a significant asset. The Archaeological Site of Volubilis is the most visited site, with approximately 300,000 visitors per year and a reported revenue of around €20 million in 2018. The Moroccan Museum Foundation manages 14 of the country's private and public museums, with 80 being privately owned, the most popular of which is Majorelle Museum (Ministry in charge of Tourism Handicraft & Social Economy).

The Handicraft sector is a very important one in the country, with a global volume of €7.5 billion and 1.2 million jobs related to the sector.³ The Ministry in charge of Handicrafts (which also covers the tourism and social economy sectors) has developed a National Label for Handicraft to preserve and guarantee the quality of goods. This Label aims to preserve values (authenticity/ancestral knowledge, child protection, 'gender' approach) and safeguard the professional environment (sustainable development and environmental protection, working conditions, security for the customer, quality and excellence). Since 2015, Regional Handicrafts Development Plans (PDRA) have also been developed, in order to link public policies to regional and local realities and contribute to territorial development dynamics.

³ Source: Ministry in charge of Tourism Handicraft & Social Economy www.mtataes.gov.ma



Key CCI Figures In Morocco (Continued)

CCI public policies place increasing weight on innovation, inclusiveness and, more generally, on new emerging and promising CCI, such as the film industry, the music industry, digital arts and creation, interactive and VR narrations, video games, as well as digital heritage and museum management.

The film industry is certainly amongst the most promising and advanced of the emerging CCI in Morocco. Over 15 major film festivals have been organised in the country. Beyond doubt, the most important one is the Marrakech International Film Festival (<https://www.festivalmarrakech.info/en/>) created in 2001, which saw the participation of pivotal figures in the global movie industry (such as Francis Ford Coppola, Martin Scorsese, Robert De Niro and Agnès Varda). According to a 2019 Cinematographic Report (produced by the Moroccan Cinematographic Centre), a total budget of close to €70 million has been invested by foreign productions shot in Morocco. The country owns 6 major film studios, making it a fully-fledged film destination. Various institutions and training courses dedicated to audiovisual and film professions have started to emerge to promote youth creativity in this sector. There are 3 major film schools (Rabat, Marrakech and Ouarzazate), in addition to Masters programmes and academic training curricula specialising in audiovisual professions. A total of 18 national feature films were produced in 2015, 16 of which were 100% nationally produced (The UNESCO Institute for Statistics, UIS).

Key CCI Figures In Morocco (Continued)

Morocco's media market accounted for \$525 million USD in 2018, showing a 4% increase from 2014. Print and TV each represents 30% of this market but, unlike TV, which grew by 7% between 2014 to 2018, the print sector share shrunk by 3%. Digital media was subject to the highest growth (19%). Meanwhile, the share of physical music and physical games have shrunk by 5% (Arab Media Outlook 2016-2018).

The CCI were severely hit by the COVID-19 crisis. According to estimations by the FICC, the overall loss associated to the pandemic for CCI rose to 2 billion dirhams (roughly €187 million)⁴, 1100 CCI companies saw their business decrease by 70%, and many initiatives and programmes stopped their activities. With the overall impact, it is estimated there is a loss of close to €200 million (Azdem et al., 2022).

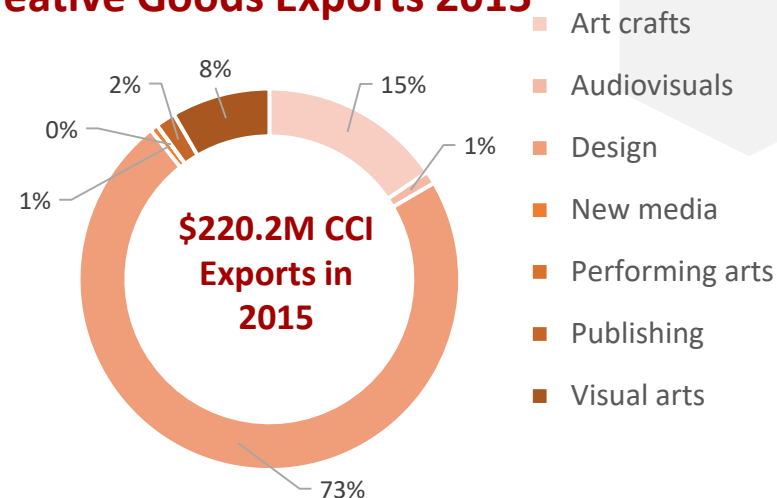


⁴ <https://aujourd'hui.ma/economie/covid-19-voici-ce-que-propose-la-federation-des-industries-culturelles-et-creatives-ficc>

CCI Exports of Morocco

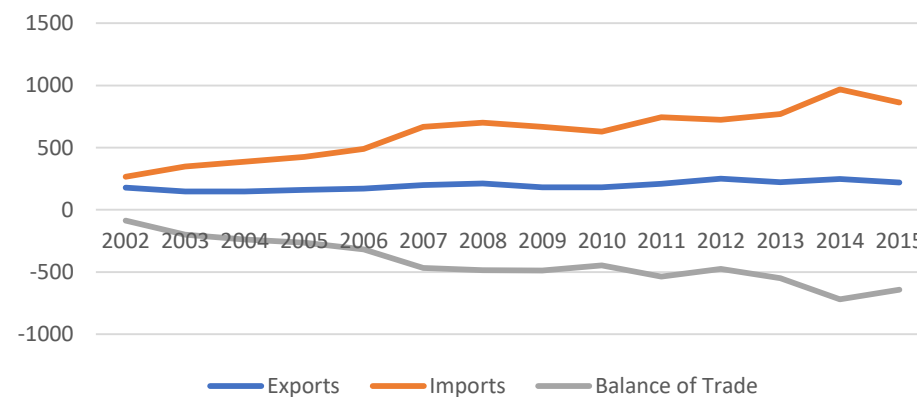
According to the UNCTAD dataset on creative industries (UNCTAD, 2018), Morocco's exports of creative industries reached \$220.2 million USD in 2015; 73% of these exports were in design, whilst 15% were art crafts and 8% visual arts. On the other hand, the creative industries' imports were as high as \$863.3 million USD in 2015, representing a significant deficit in the country's balance of trade for creative industries and indicating a higher national demand than supply for creative goods.

Creative Goods Exports 2015



Source: UNCTAD global database on creative economy

Morocco CCI trade performance (in million USD)



Source: UNCTAD global database on creative economy

CULTURAL INFRASTRUCTURE



80 Museums*



69 Theaters



31 Cinemas



1 Opera House**



24 Cultural houses



640 Libraries***

Numbers up to the end of 2020, non-exhaustive list based on inputs provided by CREAT4MED Technical Experts for Morocco, desk research, website of the Ministry of Youth, Culture and Communication, and Med Culture report (<http://www.medculture.eu/fr/country/infographics/morocco.html>)

*Morocco has 15 public museums

** Morocco's first Opera house, Opéra Royal du Maroc, will be inaugurated soon <<https://www.operaroyaldumaroc.com/>>

*** Out of the 640 Moroccan libraries, 350 are officially managed by the Ministry of Youth, Culture and Communication (source: Azdem et al. 2022, p. 106)

MAIN CCI ACTORS

CCI Ecosystem

01

Government

02

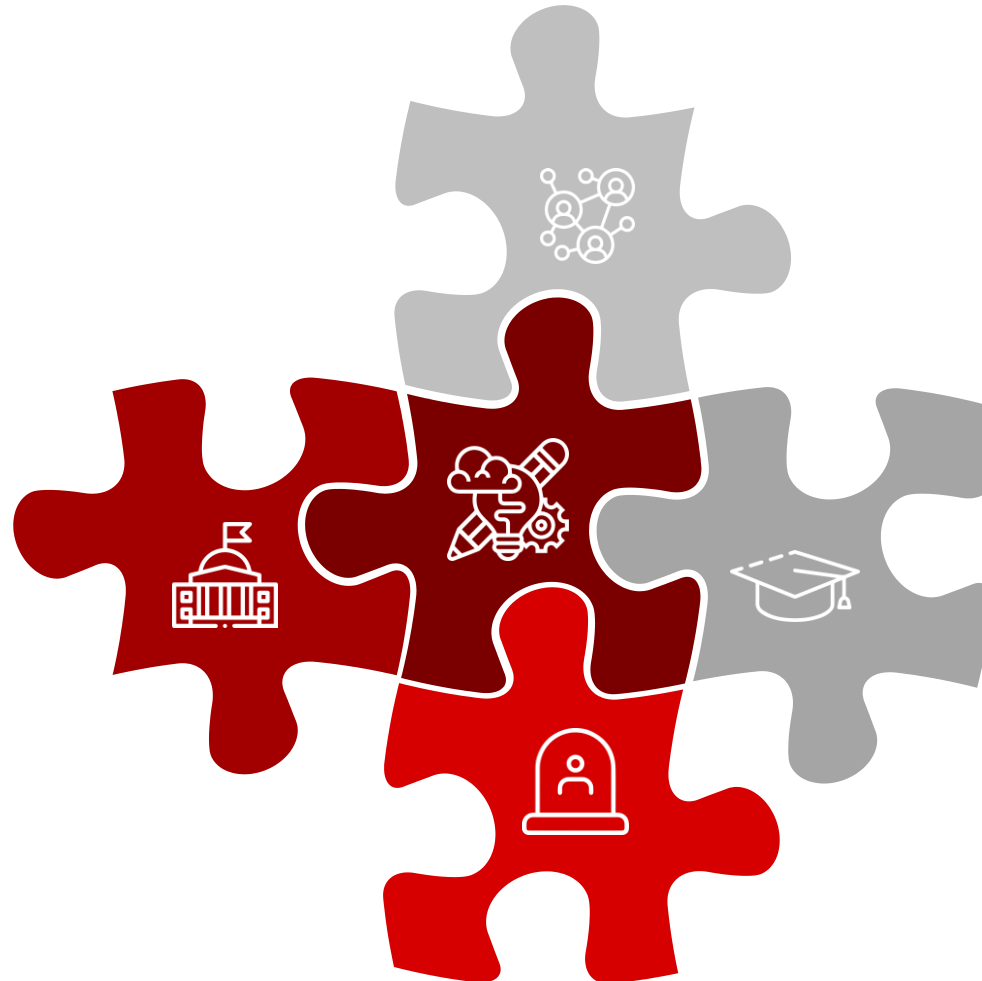
Private Sector

03

Associations & NGOs

04

Academia



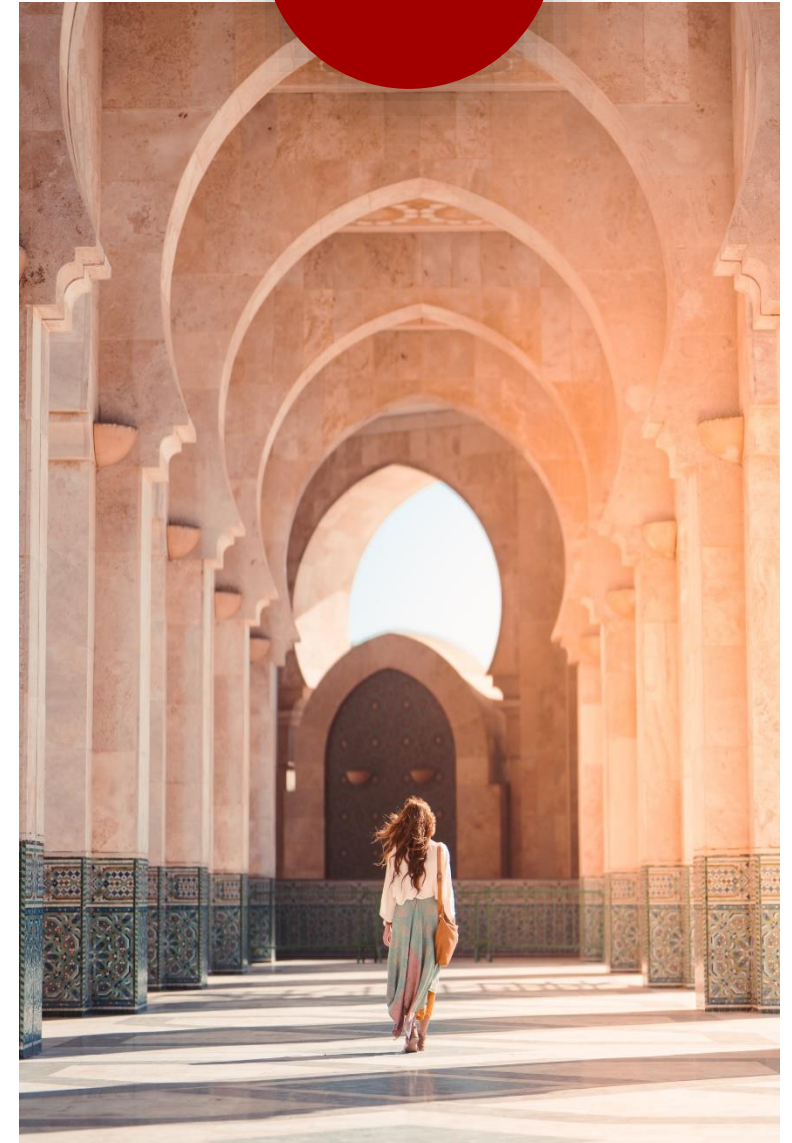
Governmental Actors



Various government entities have been promoting CCI, including:

- Ministry of Youth, Culture and Communication (<https://www.minculture.gov.ma/fr/>)
- Ministry of Industry, Trade, Green and Digital Economy (<https://www.mcinet.gov.ma/en>)
- Ministry in charge of Tourism Handicraft & Social Economy (<https://mtataes.gov.ma/fr/>)
- TAMWILCOM / Caisse centrale de Garantie -CCG (<https://www.tamwilcom.ma/>)
- OFPPT - Moroccan Office for Vocational Training (<https://www.ofppt.ma/>)
- Centre Cinématographique Marocain (<https://www.ccm.ma/>)
- Fondation Nationale des Musées (<http://fnm.ma/>)
- Maroc PME (<https://marocpme.gov.ma/>)
- Moroccan Federation of Leather Industries - FEDIC (<https://www.fedic.ma/>)
- Regional Investment Centre of Souss-Massa (<https://agadirinvest.com/>)
- National Council of Moroccan Languages and Culture/ Conseil National des Langues et de la Culture Marocaine

We did not observe any systematic coordination between these actors to further develop CCI.



Private + Sector Actors



Private sector CCI actors include artists, designers, architects and other individual creative workers, as well as support organisations such as:

- Federation of Cultural and Creative Industries - FICC which is a part of CGEM⁵ (<https://cgem.ma/fr/federations-sectorielles/federation-des-industries-culturelles-et-creatives--ficc---2009/>)
- Réseau Entreprendre Maroc (<https://www.reseau-entreprendre.org/maroc/>)
- Emerging Business factory (<https://www.emergingbusinessfactory.com/>)
- Marrakech International film Festival (<https://www.festivalmarrakech.info/en/>)
- Fédération des Technologie de l'Information – APEBI (<https://www.apebi.org.ma/>)

Incubators and support organisations including but not limited to:

- La factory (<https://www.lastartupfactory.co/>)
- Cluster Solaire (<http://www.clustersolaire.ma/>)
- Impact Lab (<http://impactlab.africa/>)
- Réseau Entreprendre Maroc (<https://www.reseau-entreprendre.org/maroc/>)
- StartUp Maroc (<https://www.startupmaroc.org/>)
- Cluster Menara (<http://clustermenara.com/>)
- Enactus (<https://www.enactus-morocco.org/>)
- Bidaya (<https://www.bidaya.io/>)
- Endeavour (<https://endeavor.org/location/morocco/>)
- Moroccan Centre for Innovation and Social Entrepreneurship – MCISE (<https://www.mcise.org/>)
- Kluster CFCIM (<https://www.cfcim.org/kluster>)
- HSeven (<https://www.hseven.co/>)
- CEED Morocco (<https://ceed-global.org/morocco/>) has partnered with USAID to provide the learning and support needed for entrepreneurship to continue to develop in Morocco.

We did not observe any systematic coordination between these actors to further develop CCI.

⁵ The global Moroccan Business Confederation: Confédération Générale Marocaine des Entreprises, CGEM ; <https://www.cgem.ma/>

Associations⁺ & NGOs



Associations & civil society organisations active in CCI include but are not limited to:

- Moroccan Association of Entrepreneurs of Live Shows – AMESVI (<https://www.amesvi.ma/>)
- The HIBA Foundation (<https://www.fondationhiba.ma/>) which was created in 2006 at the initiative of His Majesty King Mohammed VI as a non-profit association working towards the development of culture and the preservation of Morocco's cultural heritage
- Drosos Foundation (<https://drosos.org/en/about/#morocco>)
- Arab Media Lab (<http://www.arabmedialab.org/>)
- Connect Institute (<https://connectinstitute.ma/>)
- Arab Fund for Arts and Culture - AFAC (<https://www.arabculturefund.org/>)
- Association Racines (<https://www.racines-aisbl.org/en/>)

An interactive platform for mapping of the cultural industries and actors has been developed by Racines Association:

<https://www.artmap.ma/fr/>



The following international organisations are particularly active on the ground:

UNIDO; UNESCO; French Development Agency (AFD); French Institute in Morocco; Wallonia-Brussels Federation in Morocco; GIZ Morocco.

We did not observe any systematic coordination between these actors to further develop CCI.



Academia⁺

The following institutions are active in the CCI on the educational level:

- Ecole Supérieure de l'Audiovisuel (ESAV) - Marrakech (<https://esavmarrakech.com/>)
- Université Euromed de Fès – UEMF (<http://www.ueuromed.org/>)
 - Ecole du Digital et de l'Intelligence Artificielle – EDIA (<https://ueuromed.org/en/etablissement/ecole-dingenierie-digitale-et-dintelligence-artificielle-eidia>)
 - Ecole d'architecture et de design – EMADU
- Mohammed V University (<http://www.um5.ac.ma/um5/>) with a program on Art and design
- Hassan II University of Casablanca (<http://www.univh2c.ma/>)
- Ibn Tofail University (<https://uit.ac.ma/>)
- Isca Film School (<https://www.isca.ma/>)

We did not observe any systematic coordination between these actors to further develop CCI.

GOVERNMENTAL INITIATIVES TO ⁺ PROMOTE CCI

Morocco has made the Cultural and Creative Industry a national priority, with the first governmental session dedicated to CCI in October 2019. The creation of the FICC was a strong signal for the CCI private sector in Morocco and an illustration of the willingness to synergise the different private players in the sectors and to advocate the CCI's expectations with the Government. In response to the negative impact of the COVID-19 pandemic on CCI, the FICC signed a framework agreement in early January 2021 with the Ministry of Youth, Culture and Communication, the Ministry of the Economy, Finance and Administrative Reform and the Ministry of Labour and Professional Integration. The measures revolve around 4 strategic axes:

- preserving employment, through the payment of a fixed monthly allowance of €200;
- postponing the payment of social contributions and extending the tax exemption on income supplements over the same period;
- extending the repayment periods for “Damane Oxygene” loans; and
- establishing a moratorium on the repayment of due dates of bank loans and leases until March 31st 2021, without penalties.



GOVERNMENTAL INITIATIVES TO PROMOTE CCI (CONTINUED)

In June 2020, the Ministry of Youth, Culture and Communication launched an exceptional support programme for cultural players. The publishing sector has benefitted from a budget of over 9 million dirhams, theatres from over 19 million dirhams, visual arts from over 3 million dirhams and music and choreography from 14 million dirhams (Azdem et al. 2022).⁶

On January 27th 2022, a partnership agreement was signed between the Ministry of Youth, Culture and Communication and the Federation of Creative and Cultural Industries (FICC) in order to go further into the dynamics and structuring of the CCI in the fields of art and publishing, as well as associations and businesses, with a view to mitigating the socio-economic impact of the state of health emergency.⁷



⁶ For more information about this program visit: <http://www.mincom.gov.ma/programme-exceptionnel-de-soutien-2020-a-culture/>

⁷ <https://www.maroc.ma/fr/actualites/signature-rabat-dune-convention-de-cooperation-pour-le-developpement-des-industries>

GOVERNMENTAL INITIATIVES TO **PROMOTE CCI (CONTINUED)**

Legally, an artist's status is recognised by law number 71-99, of June 19th 2003. From this, artists can obtain a professional card and are required to sign a contract with their employer. The Act provides access to social safety nets (healthcare coverage, for instance) through a national mutual insurance scheme. The Act also provides public administration employees who carry out artistic work with up to 15 days of special leave every 6 months. (Gruber, 2019).

There is status for self-employed workers, from which many artists and CCI workers can benefit, with relatively low levels of associated taxes (1.5% of annual revenue). Cultural workers can also potentially benefit from areas dedicated to the Social and Solidarity Economy (SSE).

Furthermore, in February 2021, the establishment of a legal framework for crowdfunding became part of the government's integrated approach to supporting economic and social development, as well as channelling collective savings towards new opportunities. There are many other government initiatives to facilitate entrepreneurial access to finance, such as TARWIR, ILAYKI and INTELAKA, to name a few.



Intellectual Property Rights (IPR)



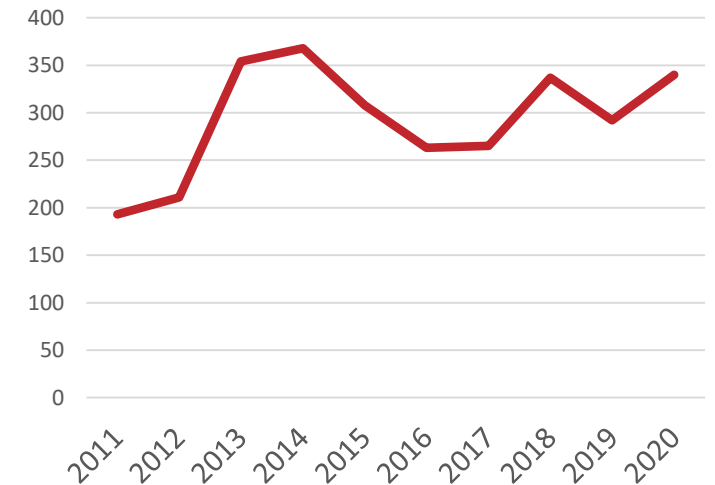
Creative industries, by their nature, rely heavily upon intellectual property (IP). Morocco joined the World Intellectual Property Organisation (WIPO) in 1971 and, as an active member, has developed 166 IP-related laws and signed 46 treaties.

Morocco currently runs 2 IP offices:

- Copyright Office of Morocco (<https://bmda.ma/>)
- Moroccan Industrial and Commercial Property Office (OMPIC) <http://www.ompic.ma/fr>

The number of patent filings, as a proxy for innovation (and creativity), has risen since the beginning of the 2010s, reaching a peak in 2014 and remaining stable even throughout the COVID-19 pandemic.

**Patent Filings (Resident plus
Abroad, Including Regional)**



Source: WIPO statistics database. Last updated: January 2021



The Al-Rawabet project

funded by the United States Department of Middle East Partnership Initiative (MEPI), in coordination with the Near East Foundation (NEF), this project is aimed at strengthening the entrepreneurial ecosystem by connecting business development service providers and incubators and strengthening their capacity to meet the needs of businesses.

Think Tanger

<https://www.think-tanger.com/>

Financed by the Dorosos foundation, this project aims to develop the creativity of young people from difficult neighbourhoods by involving them in a process that makes use of urban space.



Afrique Créative

<https://afriquecreative.fr/en/afrique-creative-partnering-talent/>

Financed by the Agence Française de Développement (AFD), “Afrique Créative” is an incubation programme in 5 African countries: Burkina Faso, Morocco, Senegal, Uganda and Tunisia. “Afrique Créative” addresses operators who combine creativity and entrepreneurial spirit, in order to maximise their potential in terms of job creation and economic growth.



Media Art Morocco

<http://www.mediaartmorocco.org>

The overall objective of Media Art Morocco is to provide a modern education platform through which the youth community of Marrakech and southern Morocco can learn to develop their skills of self-expression. By the Dorosos foundation and Arab Media Lab.



Micro-Folie programme

<https://if-maroc.org/micro-folies/>

The Micro-Folie programme is a cultural and digital space within the French Institute in Morocco. It includes Fab-Labs, digital laboratories that are located in the French Institutes of Morocco, as well as Digital Museums in partnership with several international institutions.

In 2019, the French Institute in Morocco published a mapping of CCI in the digital sector in Morocco, to contribute to the development of training, creation and entrepreneurship in the field of digital CCI. This mapping is part of a broader process of structuring and professionalising these ecosystems and consolidating economic and creative exchanges between France, Morocco and Africa.

Bibliotobiss

<https://if-maroc.org/actualites/lancement-du-bibliotobiss-espace-culturel-et-multimedia-itinerant-au-maroc/>

Launched by the French Institute in Morocco, Bibliotobiss offers a 50m2 container equipped with a library and heavily media focused, with a digital museum with TVs, video consoles, tablets with access to the Micro-Folies, virtual reality headsets, as well as a sound system to organise mini-concerts and a projection system to make outdoor movies. The space is mobile and reaches most remote regions.

All around Culture

<https://allaroundculture.com/>

Co-funded by the European Union, this project provides support to cultural institutions, initiatives and individuals to strengthen their capacities and increase their reach through funding, knowledge exchange and networking opportunities.

CHALLENGES & OPPORTUNITIES

Challenges:

Amongst the challenges raised by the different players in the sector, the following are the most frequently mentioned:

- Although the FICC has developed a definition for CCI, this definition has not been officially adopted at the national level and data is not collected in a systematic way
- There is a lack of coordination among key stakeholders and between existing initiatives to build synergy
- There is poor awareness of the huge potential of CCI to generate value, as culture is often monopolised by other sectors and is not regarded as a viable economic activity by itself, leading to:
 - Low commitment amongst actors to create a true CCI ecosystem
 - Reluctance of young people to pursue a career in CCI
- IPR is weak: low awareness of the importance of IP filings and an absence of adequate protection from copyright violation
- There is a lack of public policies and regulatory legislation to support CCI
- There is a lack of skilled professionals in technical areas of CCI, such as audiovisual or editing, and a lack of cultural managers who can commercialise and distribute cultural goods and services
- Absence of professional training to operate cultural infrastructures (theatre, opera, ...) and to enable the ecosystems to promote professionalism in culture

CHALLENGES & OPPORTUNITIES



Opportunities:

- Morocco's rich cultural heritage and its young and vibrant population, who are both providers and consumers of creative goods/services, present enormous opportunities for the CCI in Morocco.
- The prospects for economic policies after COVID-19 will create new opportunities for the CCI. One example is the Investment Strategic Fund awaiting a forthcoming announcement by His Majesty King Mohammed VI, which can potentially benefit CCI.
- The consensus is that the post-COVID-19 economy will be shaped by three main pillars: 1) the care and safety economy, which aims to secure more inclusive, equitable and sustainable development through education, health and food security; 2) the green economy; and 3) the digital economy. CCI plays an important role in all of these pillars. They can, therefore, be both the backbone of the post-COVID-19 new economic model, as well as being tools and instruments laid out for these three pillars.





POLICY + RECOMMENDATIONS

Consolidate the institutional framework:

- Coordinate and involve CCI stakeholders in the decision-making process of public policies related to their sector.
- Increase the territorial dimension of the overall CCI governance system, in order to link the elaboration and implementation of public policies to on-the-ground regional realities. This should be facilitated by the overall strategy in Morocco for advanced regionalisation.
- Coordinate, through the FICC, the various private sector initiatives, in order to consolidate public-private collaboration. The industrial strategy in Morocco is built around ecosystems that are supported by proactive incentive and support instruments and are results-oriented.

Strengthen the regulatory frameworks:

- Take a global and integrated approach to the CCI sector.
- Pay special attention to areas such as intellectual property protection, data protection and the persistence of informality within the CCI.
- Provide specific allocations to the sector within the different incentive mechanisms and instruments dedicated to SMEs, start-ups and vocational training, especially for young people, in order to increase job opportunities.

Invest in raising awareness:

- Build the “public of tomorrow” through institutional programmes of education and communication amongst young people and parents.
- Provide training programmes in the necessary technical areas of CCI to enhance the quality of production, as well as training in the domain of cultural management.
- Increase support to CCI institutions, foundations and stakeholders, with the aim of opening new horizons for young people.

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Creative + Mediterranean

The Creative Economy has become a strategic asset for innovative job creation around the world. Cultural and Creative Industries (CCI) represent nearly 30 million jobs worldwide and are major drivers of the economies of developed and developing countries (UNESCO). CCI contributed as much as 7% to the global GDP and was estimated to be around 10% of the GDP in the MENA Region (World Bank 2017). Within the CCI (mainly architecture, design and photography), there were 1.2 million cultural enterprises, generating €193 billion of value added in the EU. It is a growing and promising industry that has become strategic, not only because of its impact on employment creation, but also due to its influence on the creativity and social cohesion of societies.

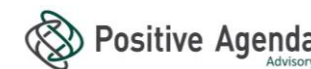
CREACT4MED is an EU-funded project focused on strengthening CCI businesses and job creation, giving support to entrepreneurs, start-ups and SMEs in particular, and targeting young people and women in the Southern Neighbourhood of the European Union.

Budget: €2,220,675, 90% of which funded by the EU Commission

Timeline of implementation: March 2020 - February 2024

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Coordinated by: Involved in Implementation:



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