

Getting into the race

Morocco's lessons
from diversification



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St Margaret's
3 Rockridge Road, Parktown, 2193

P O Box 7006, Johannesburg, 2000

Tel. +27 (11) 356-4650

Fax. +27 (11) 726-4705

e-mail: businessleadership@businessleadership.org.za

www.businessleadership.org.za

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Mohammed Dahbi,
Terence McNamee, Greg Mills, Michael
Spicer and Lyal White

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7 About the authors

Mohammed Dahbi is dean at Al Akhawayn University, **Terence McNamee** is a director of the London-based Royal United Services Institute, **Greg Mills** heads the Johannesburg-based Brenthurst Foundation, **Michael Spicer** is the chief executive officer of Business Leadership SA and **Lyal White** is with the Institute for Global Dialogue.

7 About this report

This report – the results of a survey conducted on behalf of the Brenthurst Foundation and Business Leadership South Africa. It is one of a series of reports on the investment and business climate in southern African countries, based on input from the private sector.

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7 Getting into the race

EIGHT YEARS AGO, Morocco boasted only a clutch of manufacturing companies. Today, there are more than 70 aeronautical firms in the Nouasser industrial area near Casablanca airport and around Tangier alone. One of the more impressive is ASI, which manufactures wings and other alloy sections for Airbus and Dassault for the A318-320s and the Falcon range of executive jets, respectively. 'Trucks leave Casablanca with parts on a Friday afternoon,' says ASI president Mehdi Bencherki, 'and by Monday they are with Airbus in Toulouse.' ASI's skilled labour force of 83 is expected to expand to 130 by the middle of 2009. Across the sector as a whole, the work force is doubling every four years. And Morocco has exploited its relative advantage in labour costs: in the aeronautics industry, labour is half the cost of that in France, and more flexible, working 44 hours a week, compared to the 35 hours of its French counterparts.

Examples of economic success and best practice relevant to African development are most common in Asia and, perhaps, Latin America. But African leaders and policy makers are quick to emphasise the distinct differences in culture, history and demographics that lessen the applicability of Asian and Latin American models in the African context.

Of the few meaningful examples on the continent itself, Morocco stands out. Although its social and political histories differ in important respects from much of sub-Saharan Africa, Morocco shares many of the same challenges, both internationally and within its own borders. Just a few decades ago, less than 15 per cent of Moroccans had access to water; today the figure is reversed, and only about 15 per cent do not. Despite Morocco's proximity to Europe, only recently has it integrated significantly with the global economy. Morocco's record of successful economic reform and progressive planning therefore provides a number of clear and instructive lessons for other African countries.

This paper examines the Moroccan reform experience and is based on the findings of a seminar held in Ifrane, Morocco conducted by Al Akhawayn University, the Johannesburg-based Brenthurst Foundation and Business Leadership SA, and attended by more than 20 African policy makers and opinion formers. (See the Appendix for the full list of participants and the event programme.)

The Moroccan reform story

In less than a decade, Morocco has gone from an economic straggler to a foreign investor's dream. The country's economy grew by an average of over 5 per cent between 2002 and 2006, and today it is one of the top five recipients of foreign investment in Africa. Once best known as a *louche* retreat for European travellers, Morocco is now home to some of the most ambitious manufacturing, infrastructure and tourism schemes in Africa. It was recently praised by the managing director of the International Monetary Fund (IMF) as a 'pillar of development in the region'¹ and an example of progressive reform for Arab and African countries alike. Yet, notwithstanding some inherent advantages, notably Morocco's location and relatively low labour costs, there was nothing inevitable about this turnaround.

Table 1: Morocco: Selected economic indicators, 2000–07

	2000	2005	2007
GDP ¹ (US\$ bn)	37,06	58,96	73,28
GDP growth (%) ²	1,8	2,4	2,3
GNI ³ per capita (US\$)	1 340	1 990	2 250
Inflation (%)	-0,8	2,1	2,0
FDI ⁴ (net inflows, US\$ bn)	2,21	1,552	5,9 (est.)
Unemployment rate (%)	12,5	11,1	10,0
Trade deficit (US\$ bn)	3,5 (est.)	7,9	11,1

1 *Gross domestic product.*

2 *GDP growth in 2006 was 8% and in 2008 is expected to be around 7%. Such inconsistency is partly attributed to the economy's dependence on agriculture.*

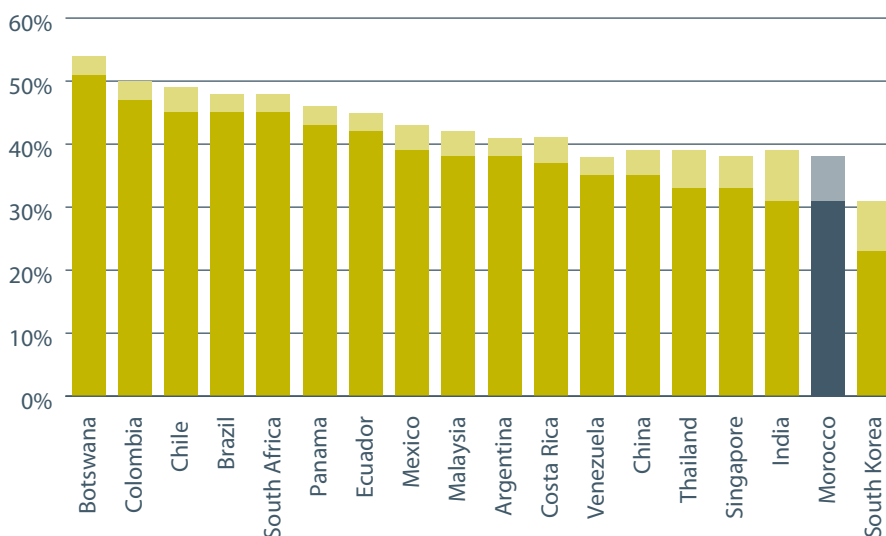
3 *Gross national income.*

4 *Foreign direct investment.*

Source: World Bank, <<http://www.worldbank.org>>; IMF, <<http://www.imf.org>>; Moroccan–American Trade and Investment Centre, <<http://www.moroccanamericantrade.com>>

The Moroccan kingdom, the oldest in the Muslim world, is a melting pot of Berber, Arab, African and other groups. At its nearest point, Morocco is only 14 km from Spain. Geography and strategic location have always played a significant part in its history. During the colonial era, European powers fought frequently to gain control of Morocco's territory, and today it is still seen as a key bridge between Europe and Africa.

After independence in 1956, Morocco faced many acute challenges that, over time, threatened the stability of the kingdom: the growing disparity between urban and rural² areas in education, health and poverty levels; a weak civil society; the exclusion of certain groups, particularly women; the lack of effective governance at central and local levels; and political discord between the monarchy and political parties.

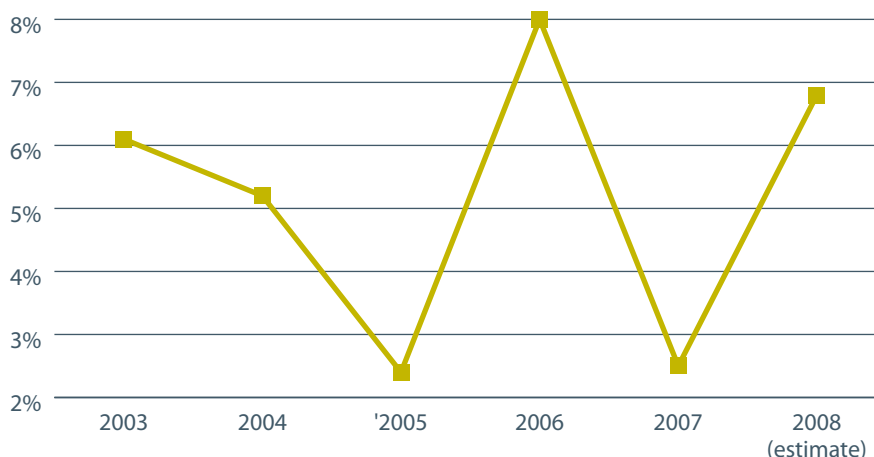
Figure 1: Income distribution in middle-income countries

Source: UN Development Programme (UNDP), Human Development Index, 2006.³

The resolution of this latter conflict, which lasted nearly four decades, was pivotal in galvanising momentum for reform across all areas of Moroccan society. So too was the strong political will and committed leadership of the country's head of state, King Mohammed VI. He articulated a clear vision for the country's future – 'Morocco for today and tomorrow' – which mobilised society. A landmark initiative during this period was the study he commissioned in 2003 on human development in the kingdom.⁴ For decades, 'human development' had been a slogan; now it was a political choice, an imperative even. Thus, for the first time since independence, the key obstacles to development in Morocco were examined and plans were devised to address them.⁵ This entailed some risks: in being open and transparent, Morocco exposed its plans and programmes to rigorous public scrutiny, and their shortcomings were identified. But this willingness – and confidence – to be transparent was critical to learning from past mistakes, then using that experience to create more growth and successful enterprises.

In examining how Morocco got its act together, three broad factors stand out. Firstly, after decades of dismal economic performance – even a growth rate of 4 per cent for a period in the 1980s was not sufficient to address the scourge of unemployment and other development challenges – a macroeconomic stabilisation programme was initiated. The centrepiece of this new approach was the privatisation of state-owned enterprises and better fiscal management.

Morocco's economic growth has remained somewhat erratic in recent years as a result of massive downturns in agricultural production following water shortages and climate change. This has encouraged greater economic diversification, in particular toward non-traditional sectors capable of delivering sustainable economic growth and fostering modernisation.

Figure 2: Irregular economic growth, 2003–08 (% GDP growth)

Source: Ecofinance, *The Ecofinance Guides, 2008: Morocco: A Market and Its Potential*.

Secondly, the political environment was transformed. Reforms started by King Hassan II were accelerated after his death in 1999 by King Mohammed VI, known to many Moroccans even before taking power as the 'Prince of the Poor'. A bicameral legislature was created in 1997, parliamentary elections were held for the second time in September 2002, and municipal elections were held a year later.

Thirdly, since 2003 the government has adopted a proactive and aggressive growth strategy⁶ aimed at gaining a greater slice of trade and investment through fresh privatisations (including the state-run airline, Royal Air Maroc, beginning in 2009); the signing of free trade agreements with the United States, Turkey, Jordan, UAE and Egypt; and the Emergence Programme.

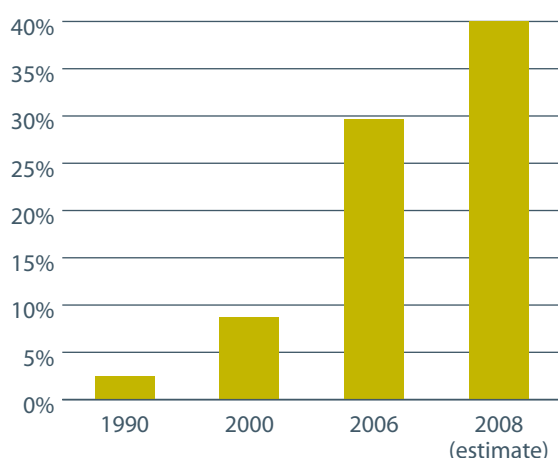
'Moroccans', says Hammad Kassal, the vice president of the Chamber of Enterprises in Casablanca, 'are today convinced that development cannot take place involving Moroccans alone, but in partnership with other countries. Previously the economy was dominated by the state, and was based on what the state could afford, which was peanuts.'

The Emergence Programme, the result of a McKinsey's 2003 report, has identified seven sectors for export potential: aeronautics, agroprocessing, off-shoring, sea products, automobiles and parts, textiles, and speciality electronics. This programme is expected to add US\$100 billion to the country's GDP by 2015. It is designed to complement other schemes, such as the 'Plan Azur' objective to increase tourists from the current level of 7 million to 10 million (and to create 600 000 jobs) by 2010 and 15 million by 2020; the 'Green Morocco' initiative promoting vertical integration and improved yields in agriculture; and the 'Rawaj' programme to modernise internal commerce.

To attract investors, the state has provided a number of incentives, including support for training (the government gives firms money to do so), the designation of specific industrial parks and the discretion to offer free land, and a total exemption from corporate and local taxes for export companies.

The outcome of these policy shifts is startling. FDI has averaged (net) US\$2.5 billion annually for the past five years. In 2007 FDI flows were US\$5.7 billion, up from US\$2.9 billion in 2006. This figure has made Morocco the largest recipient of FDI in Africa among the so-called 'non-oil economies', surging ahead of South Africa. There has been a significant decline in unemployment (now officially under 10 per cent), partly a result of new programmes such as First Job Contracts, which exempts employers from social charges on low-end wages. Some 300 000 new jobs were created in 2006 alone.

Figure 3: FDI stock, 1990–2008 (US\$ bn)

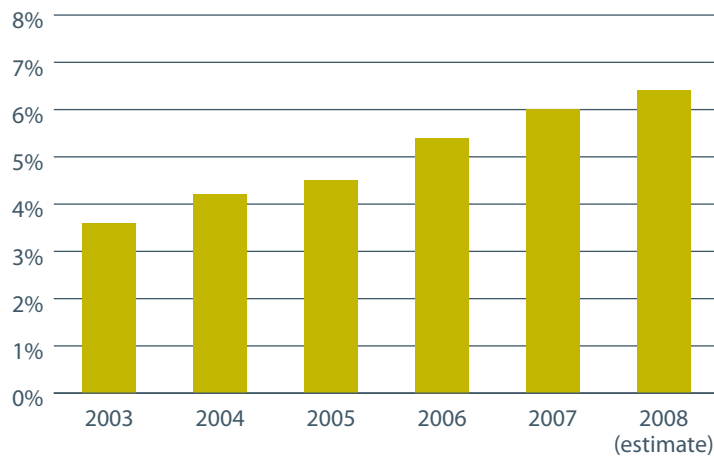


Source: Ecofinance, *op. cit.*

The car maker Renault has committed to opening a US\$200 million plant at Tangier with an eventual capacity of 400 000 vehicles per year. The giant plant and the sub-contractors that supply it are anticipated to keep 400 000 people in work. Already this sector employs 80 000 people, and 80 per cent of the cars are for export, with most going to Europe. To reduce lead times and bureaucratic holdups in getting goods to the continent, customs procedures have been streamlined and officials rigorously trained.

The country's investment promotion agency profiles potential investors sector by sector, then goes out and gets the ones it targets. Part of this strategy includes a number of research and promotion centres, like the Moroccan-American Trade and Investment Centre, which targets potential investors in the United States; and initiatives like Brand Morocco, which helps build a positive commercial image of Morocco abroad.⁷

Morocco is also attracting substantial remittances from the three million Moroccans living abroad, which currently totals more than US\$6 billion annually, or 10 per cent of GDP.

Figure 4: Remittances from Moroccans living abroad, 2003–08 (US\$ bn)

Source: Ecofinance, *op. cit.*

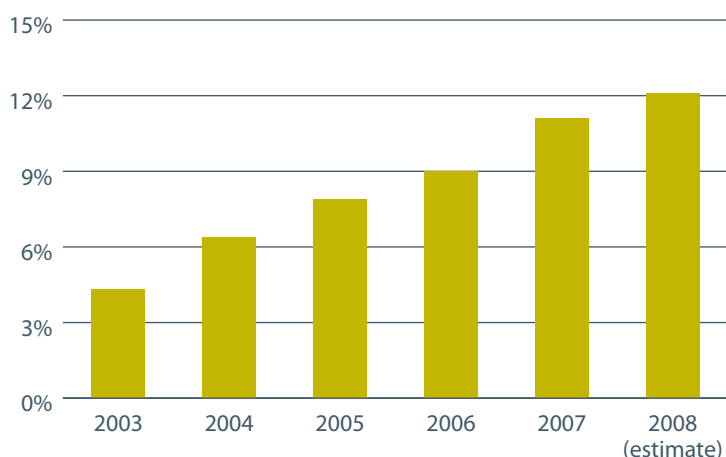
Trade agreements – and Morocco’s free trade agenda – are a national priority. The country has targeted particular trade partners in line with its production capacity and industrial potential, not to mention its unique location. Preferential market access offers real opportunities for Morocco’s traditional and non-traditional sectors, and is an essential component of Morocco’s future development.

Table 2: Targeted free trade agreements concluded by Morocco

European Union	1996
European Free Trade Area	1997
The Arab League Accord	1998
Quad Accord	2004
Turkey	2004
United States	2005
Mediterranean Free Trade Area	Under negotiation

Source: Ministry of Industry, Trade and New Technology.

Despite a proliferation of agreements with some of the largest markets in the world, Morocco’s trade deficit has increased steadily over the past few years and is expected to reach US\$12 billion in 2008. Export growth in new industries – aeronautics, microelectronics and automotive in particular – is expected to counter this deficit in years to come.

Figure 5: Trade deficit, 2003–08* (US\$ bn)

Source: Ecofinance, *op. cit.*

Morocco is, of course, not without its share of challenges. ‘We know we have a big problem with poverty’, says Marwane Mansouri of Investir au Maroc in the Ministry of Industry, Commerce and New Technologies. Its GDP per capita is close to US\$4 000, but in some rural parts of the country people live on closer to a dollar a day. Despite notable improvements in education, literacy rates hover around 50 per cent. Business people often complain about corruption and bureaucratic inertia. The unresolved Western Sahara issue is a sticking point to improved foreign relations, especially within Africa. And with two-thirds of Morocco’s 33 million people today under 25, the spectre of jobless and disillusioned youth becoming radicalised cannot be ignored.

Pinpointing the Lessons

Moroccans have for the most part shown an impressive willingness to confront these weaknesses and vulnerabilities head-on, gripping the development challenge rather than waiting for someone to do it for them. Outlined below are a number of pertinent lessons in the realms of policy, process and mindset that we have drawn from the Moroccan experience.

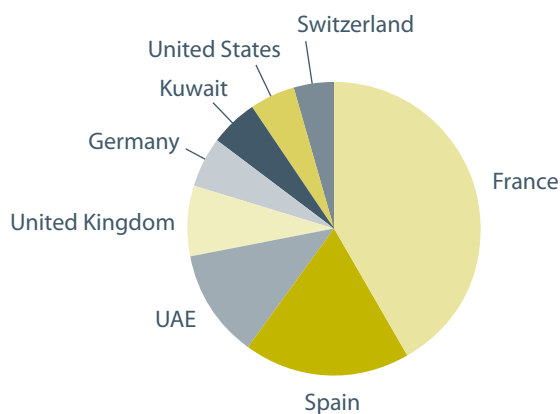
Create a national vision that can mobilise society: Morocco is one of the few countries in Africa that has a vision of human development that is driven and maintained at the top level of government. Critical to this vision’s success is its appeal across the whole of society, which has engendered a shared sense of ownership over the development process. In the 1980s Moroccans were involved in development at the local level, but there was no synergy in planning and coordination between the grassroots and the central authority. Today, Moroccans talk about ‘social inclusion and social cohesion’ at the national and local levels.

Progress will stall without political will and committed leadership: Essential to Morocco’s success has been the consistency of purpose and policy demonstrated by King Mohammed VI and his government. The king, in particular, recognised the need to create a stable and secure environment, which was made possible through key structural reforms.

Integrate with the global economy: Morocco has demonstrated that prosperity and human development require integration with the global economy. Foreign investment and expertise have been actively pursued to help Morocco 'get into the race'. In mining, for example, Morocco is attracting external investment and know-how to exploit new opportunities beyond phosphates and diversify into base and precious metals. Investments and programmes are designed to use top-flight research and insight to improve performance and exploration activities.

The country's proximity to Europe, its main market for exports and tourists, has been a defining feature of its economic and political history, but it is only in the past decade that Morocco has used this advantage to significant effect. This has required a change in cultural mindset: today Morocco operates with Europe as if it were *part* of Europe itself.

Figure 6: FDI in Morocco per country, 2007



Source: Investment Commission, Ministry of Industry, Trade and New Technologies.

Examples of this include free trade zones, industrial zones and regional investment centres across the country, which have provided a great incentive and security for investment. A free trade zone located in the north of Morocco just 14 km south of Spain is ideally located as an export platform into Europe. Managed by a private company, the Tangier Free Zone prides itself on efficiency through direct access to port and airport facilities. Companies located in this zone are exempt from various trade-related duties and legislation, as well as a range of taxes, including patent tax (for 15 years), urban tax (for 15 years), corporate income tax (for five years), capital gains tax and value added tax (VAT). This combination offers a real incentive for FDI in Morocco.

Promote infrastructure and public works for multiple benefits: Both infrastructure and public works were used not only as magnets for investment in Morocco, but they also to facilitate its current economic growth and new frontiers of economic activity – e.g. aeronautics, microelectronics and financial services especially for trade facilitation between Europe, the Middle East and Africa – on a global stage. Road and railway networks are being upgraded and airport and port facilities improved. Infrastructure projects are geared toward improving Morocco's linkages with Europe and Africa, and minimising the lag time between Morocco its key markets.

Table 3: Investment by sector, 2003–07 (US\$ m)

Sectors	2003	2004	2005	2006	2007
Tourism	23,5	178,9	385,0	978,5	1 553,0
Infrastructure	211,0	255,0	303,0	515,0	950,0
Telecommunications	77,4	90,0	1 914,0	3,4	386,0
Industry	2 350,0	225,0	342,0	1 122,0	414,0
Transport	1,75	5,4	40,3	7,0	342,3
Energy and mines	13,3	42,0	47,3	13,0	352,3
Banking	7,0	191,0	5,5	183,0	228,0

Note: These figures are based on a US\$-dirham exchange rate of 1 to 8.

Source: Investment Commission, Ministry of Industry, Trade and New Technologies

Be honest about threats and challenges: Across the range of reform programmes in Morocco there has been a clear determination not to shirk the real challenges to be faced – in education, capacity building, the exclusion of groups and regions, and also geostrategic issues. This openness is reflected in robust debates within Morocco’s lively media, civil society, and local and national government. Recently, for instance, the ambitious tourism strategy Plan Azur has come in for sharp criticism in the national press for falling behind schedule.

Modernise and diversify to create an enabling environment: Modernisation and diversification make up a constant that runs through all facets of the Moroccan economy. In traditional sectors such as agriculture – which includes stock farming and fishing – investment and policies are geared toward modernisation and the more effective use of resources like water. This, together with the opening of new markets, has initiated a more productive approach toward agribusiness involving a diversity of actors from small business in Morocco to large multinational corporations that is critical to investment and production continuity in this sector.

New industries and areas of development are being explored to avoid overdependency on traditional sectors like agriculture. But even agricultural production has shifted in the direction of processed agricultural goods (from olive-based products to wine) and self-discovered industries in the realm of horticulture and innovative fish farming.

The head, the heart and the brawn are all required: One image that stood out from the roundtable meeting was the triangular relationship that was central to the Moroccan experience, described by then AUI president Rachid Benmokhtar, between the head (intelligence and know-how), the heart (passion and moral authority) and the brawn (the muscles and power). All three are necessary for society to develop successfully, and it will be up to individual countries to decide upon the appropriate balance among them.

Set sector-specific reforms within the overarching strategy: Morocco has made great strides in identifying potential winners within specific sectors that will be competitive producers for markets in Europe and the United States. These sector-specific reforms followed an important sequence of structural and efficiency-seeking reforms that were implemented in the late 1980s and early 1990s in Morocco.

Devise a skills development strategy: Investment in new sectors is linked in various ways to skills development, whether through funds filtered into universities or technical schools or through partnerships and exchanges with Moroccan research departments at universities like Al-Akhawayn. Certain incentives also encourage foreign companies to invest in the skills development of local staff, especially in specialised industries like biotechnology, microelectronics and nanotechnology, through the Envol Plan. Morocco aims to have 10 000 engineers by 2010 and the ICT sector is expected to generate over 90 000 jobs by 2013, based predominantly in large-scale technoparks in Casablanca and Rabat.

Rabat's Technopolis, known as 'the smart city for smart people', was inaugurated by King Mohammed in October 2008 – just two years after the decision to build this high-tech minicity was made. Apart from offering world-class facilities at a fraction of the cost that would be paid in Europe, Technopolis has an important socioeconomic dimension: it will create over 30 000 jobs by 2013 and train a vast array of executives and managers on the local campus, which will have a capacity of 10 000 students. The various 'poles' of Technopolis – which will include off-shoring, media, research and development, microelectronics and advanced technologies, and the university – is expected to eventually generate around US\$1.5 billion, or 3 per cent of Moroccan GDP.

Don't ignore your weak spots: The Moroccan government has prioritised efforts to reduce unemployment and poverty and enhance basic services in rural areas, which lag way behind urban parts of the country on all development indicators. By doing so, the government is beginning to reduce the former's isolation and give them a stake in the national vision. There is a keen understanding in Morocco of the dignity that accrues from employment – of simply having a job – and that dignity is recognised as a critical societal good.

Even in areas where Morocco has been very successful, such as tourism, weak spots are not ignored. Europe makes up 46 per cent of the world tourism market and accounts for the lion's share of visitors to Morocco, although these visitors are not evenly spread across all European countries. But new efforts are being made to try and gain more market shares, in particular in Germany and Italy, where Morocco has been less successful, and also in future markets, namely India, Brazil and China. [The initial statement was problematic, as these countries are a part of Europe, and it is stated that Europe makes up 46 per cent of the tourist market, hence my addition.]

Be flexible and reactive to seize opportunities: Certain sectors in Morocco stood out – in the traditional sectors, agriculture and textiles have adopted an 'adapt or die' attitude to be competitive in global markets. In these sectors, Morocco has demonstrated extraordinary clarity of vision, objectives and plans. The example of the textile industry was perhaps most instructive. Morocco has a very strong tradition in clothing. Historically, the industry has thrived, symbolised internationally by the Moroccan kaftan. In the past ten years, however, severe threats to its viability arose from competition from China; the need to adapt to the 'Fast Fashion' phenomenon;⁸ and even comparable labour costs (in Romania and Bulgaria) within its main export market, Europe. The Moroccan clothing industry has responded by developing its own vibrant magazine trade and international fashion shows; strengthening its professional textile and clothing professional associations, the largest and most active in Morocco; reinforcing the industry's competitive edge

by, for instance, diversifying into niche markets such as garments made from organic raw materials; and, most importantly, using more effectively its principal advantage, which is its proximity to market. This required major improvements in transport links, particularly to roads within Morocco itself. Today the industry target is to deliver three weeks from order.

Table 4: Breakdown of the Moroccan textile sector

	1990	2007	% increase
No. of companies	772	1 813	135%
Employment	62 710	232 000	270%
Total turnover	US\$450 million	US\$4.5 billion	1 000%
Exports	US\$100 million	US\$3.6 billion	3 500%
Investments	US\$30 million	US\$400 million	1 200%

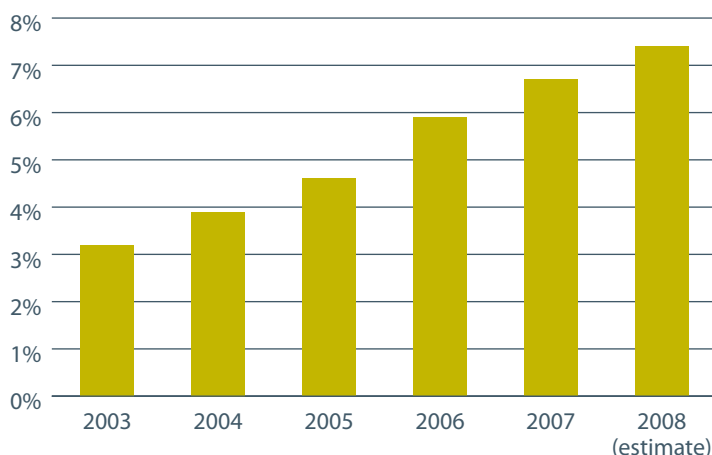
Source: Moroccan Association of Textiles and Clothing Industries.

Incentivise your priority sectors: Morocco has devised a priority list of sectors where the government will concentrate its incentive offers, namely infrastructure and in particular industry and export processing zones and technoparks, plus services that European investors would expect. Incentives come in the form of low corporate and personal income tax, and regulatory and fiscal incentives around the initial investment and operational phases of the business, all of which lower the cost of doing business, while maintaining a European standard.

Recognise key interrelationships: In its major programmes and plans, Morocco has been sensitive to key interrelationships. Through its multiple functions, agriculture is at the crossroads of major themes – economics, social cohesion, the fight against poverty, the country’s cultural heritage, the environment and human development – and this is reflected in the Green Plan. Likewise, tourism’s Plan Azur 2010 and 2020 strategy is clear on the relationship between travel and open skies, and stipulates that each hotel room should create direct and indirect employment.

Royal Air Maroc has prioritised its African links to provide easy and regular access for business and tourism between Africa, Morocco and Europe. Various government funds, like the Hassan II Fund, provide financial support and subsidies for new investment projects that include transport and aviation subcontracting. This, some say, will create 560 000 jobs. Tourism as a whole attracts more than 50 per cent of foreign investment in Morocco and creates up to 1.2 million direct and indirect jobs.

Figure 7: Increase in tourism revenue, 2003–08 (US\$ bn)



Source: Ecofinance, *op. cit.*

Of all the megaprojects in Morocco, none is larger or more significant than the Tanger Med. This €7.5 billion project, scheduled to be fully open for operations by 2012 (Terminal 1 and 2 operations are already up and running), represents Morocco’s approach to development through public–private partnerships at their best. Tanger Med is related to all industrial and large-scale infrastructure projects across the country, which ultimately depends on and feeds into what will become a port of global significance. Such a megaport facility will link west to east, Atlantic to Mediterranean and Europe to Africa. It will be an integral part of Morocco’s trade strategy and provide the next growth frontier of financial and logistical services, facilitation, and investment processing for the country.

Conclusion

The rapid pace of development in Morocco during the past decade might be difficult to sustain in the short term. Should the worst predictions about the current (2008–09) world economic crisis come to pass, Europe is likely to be severely affected, and as a consequence, foreign investment in Morocco will, in particular, suffer. Nevertheless, the recent reform and diversification of the Moroccan economy and its integration with global markets has been too profound for its wider development path to be diverted.

Critical to Morocco’s success has been strong, visionary leadership. This has been most evident in King Mohammed VI’s commitment to development and global engagement. Equally vital has been the entrenchment of a ‘result-driven government’ with a consistency of intent and strategy.

The king has made 19 visits to 15 different African countries, and Morocco is deeply involved with training and education across the continent. There are currently 7 000 Africans from 14 different countries studying in Morocco, 80 per cent of whom are on Moroccan scholarships. More recently, Morocco has realised the importance of building relations with Africa through innovative and productive measures. According to the secretary of state from the Ministry of Foreign Affairs and

Cooperation, Latifa Akharbach, 'the African continent is all about potential, but this is a message that must be delivered collectively'.

It is clear that one message for Africa emerging from Morocco's recent experience is that integration with the global economy can unlock the door to development and progress. Morocco has also shown how economic diversification and modernisation can enable small states to compete on the world stage and to get into the global economic race. ■

Endnotes

- 1 Statement by IMF managing director Dominique Strauss-Kahn following a report on the Article IV consultation with Morocco compiled in July 2008.
- 2 Today, Morocco is 55 per cent urban and 45 per cent rural.
- 3 This chart was generated from UNDP Human Development Index figures by Dr Neva Makgetla.
- 4 See <<http://www.rdh50.ma>> for a summary of the report.
- 5 These were the remarks made by the President of Al-Akawayn University, Rachid Benmoktar.
- 6 Investments in public works doubled from 2000 to 2007.
- 7 Brand Morocco is a marketing plan that aims to develop and maintain a positive image of Morocco abroad and in the process attract FDI from the United States and elsewhere. The strategy around Brand Morocco was developed in a collaborative exercise between US universities and institutions and those in Morocco (including Al-Akawayn University).
- 8 The Fast Fashion phenomenon is based on contemporary women's shopping habits, which require a new collection roughly once a month, thus requiring much greater design variety, but smaller production runs, rather than two seasonal collections.

Appendix

Programme

Day one: Friday, 24 October 2008

	Arrival in Morocco by mid-morning; transfer to Ifrane
14:15	Excursion to Azrou
Chair:	Rachid Benmokhtar , AUI president
18:00–18:30	Words of welcome Latifa Akharbach , secretary of state, Ministry of Foreign Affairs and Cooperation Michael Spicer , The Brenthurst Foundation/Business Leadership SA Rachid Benmokhtar president, Al-Akawayn University
18:30–19:30	Salaheddine Mezouar , minister of economy and finance 'Successes and Challenges of the Moroccan Economy'
20:00	Dinner

Day two: Saturday, 25 October 2008

Chair:	Mohammed Dahbi , dean, AUI
08:30–08:45	Michael Spicer , The Brenthurst Foundation
08:45–09:00	Rachid Benmokhtar , Al-Akawayn University
09:00–09:20	Ahmed Laaboudi , Centre Marocain de la Conjoncture 'The Moroccan Economy in a Developing International Context'
09:20–09:40	Mohammed Souafi , National Observatory of Human Development 'A Strategic Approach for Human Development in Morocco'
09:40–10:00	Discussion
10:00–10:30	Tea
10:30–10:50	Ahmed Chami , minister of industry, commerce and new technologies 'The Moroccan Manufacturing Experience: From Agroindustry to Aeronautics'
10:50–11:10	Mohammed Tamer , Moroccan Association of Textile and Apparel Industries 'The Moroccan Textile Industry in a Global Market'
11:10–11:30	Respondents led by: Lesotho and Swaziland (textiles), Botswana (diversification)
11:30–12:00	Discussion
12:30–15:00	Lunch; Said Elhadi , Tangier Mediterranean Special Agency 'Tanger Med, Morocco's New Mediterranean Deep-water Port: Accelerating Regional Development'
15:30–15:50	Mohammed Bousaid , minister for tourism and handicrafts 'Moroccan Tourism Strategy: Plan Azur'

15:50–16:10	Mohammed Ait Kadi , General Council for Agricultural Development 'New Challenges for Moroccan Agribusiness'
16:10–16:30	Respondents led by: Rwanda (tourism), Zimbabwe, Liberia and Somaliland (agriculture and agroindustry)
16:30–16:50	Discussion
16:50–16:10	Tea
Chair:	Eric Ross , AUI
17:10–17:30	Nabil Kerdoudi , Al Omrane Construction Holding 'Low-cost Social Housing: Needs, Policies and Incentives'
17:30–17:50	Mohammed Chafiki , Studies and Financial Forecasting, Ministry of Economy and Finance 'Investing in Morocco's Major Infrastructure Projects: Balancing National and Regional Development Needs'
17:50–18:10	Rida Lamrini , Agency for the Development of Southern Provinces 'Development through the Promotion of Entrepreneurship: IPED Programme'
18:10–18:40	Respondents led by: South Africa (infrastructure), Kenya (housing)
18:40–19:15	Discussion
20:00	Dinner

Day three: Sunday, 26 October 2008

08:30–09:30	Campus tour Summary session and closing remarks
Chair:	Michael Spicer
09:30–09:50	Hassan Abouyoub , ambassador at large, Ministry of Foreign Affairs, Morocco
09:50–10:10	Business Leadership SA
10:10–10:30	The Brenthurst Foundation
10:30–10:50	Al-Akhawayn University
10:50–11:10	Tea
11:10–12:00	Rachid Benmokhtar , AUI president 'Preparing the Human Resources for Development: Higher Education in Morocco: Al-Akhawayn University in Ifrane'
12:30–13:30	Lunch
14:00	Departure to Fes
19:00	Return to Ifrane
20:00	Dinner

Day four: Monday, 27 October 2008

08:30	Departure to Rabat
11:00	Visit Rabat Technopolis project Hosted by Abderrafie Hanouf , director general, Rabat Technopolis

12:30	Check in at hotel
13:00	Lunch at hotel
14:30	Visit Rabat Bouregreg waterfront project Hosted by Essakel Lamghari , director general, Bouregreg Development Agency

Participants from outside Morocco

- Mr Joe **Ritchie** and Mr Emmanuel **Hatgeka**, Rwanda Development Board, Rwanda
- Mr Ousman **Tall**, dir., Planning, Ministry of Agriculture, Liberia
- Mr Michael **Spicer**, CEO, Business Leadership SA, Dr Neva **Makgetla**, Presidency, South Africa
- Mr Peete **Molapo**, dir., Lesotho National Development Corporation, Lesotho
- Hon. Neo **Moroka**, minister of trade and industry; Ms Violet **Mosele**, director, Industrial Affairs and Mr Molelo **Molelo**, permanent secretary to the minister, Botswana
- Hon. Minister Victor **Bernardo** and Mr Antonio **Cruz**, Ministry of Planning, Mozambique
- Ambassador Thuita **Mwangi**, permanent secretary, Ministry of Foreign Affairs and Mr James **Kibera**, Kenya
- Mr Robert **Sithebe**, KPMG and Ms Nomusa **Tibane**, chief economist, Ministry of Finance, Swaziland
- Mr Harvey **Leared**, CEO, Origen, Zimbabwe
- Dr Greg **Mills** and Ms Leila **Jack**, The Brenthurst Foundation, South Africa
- Dr Terence **McNamee**, RUSI, UK and Dr Lyal **White**, Institute for Global Dialogue, SA (event rapporteurs)



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