

Morocco

Key indicators

Population (millions)	33.8
GDP (\$ billions)	104.9
GDP per capita (\$)	3101.3
Share of world GDP (PPP\$, %)	0.2
Current account surplus/deficit, share of GDP (%)	-1.2
Tariff preference margin (percentage points)	6.3
Imports and exports (goods and services), share of GDP (%)	81.3
Services exports, share of total exports (%)	39.2
Geographic region	Africa
Country group	
Income group	Lower-middle income

SME Competitiveness Grid Summary

Average scores [0-100]	Compete	Connect	Change
Small	50.0	70.1	43.0
Medium	50.8	75.7	51.3
Large	56.1	69.2	62.1
All	51.3	71.9	49.2
BUSINESS ECOSYSTEM	60.8	51.8	39.5
NATIONAL ENVIRONMENT	55.8	67.5	50.2

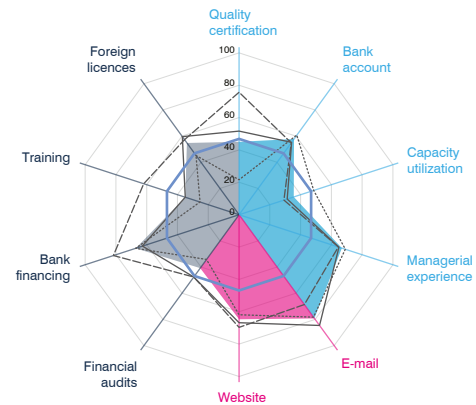
Reference level: 46.8 (a function of GDP per capita)

Weaknesses are scores below: 23.4 | **Strengths are scores above: 70.3**

SME Competitiveness Grid

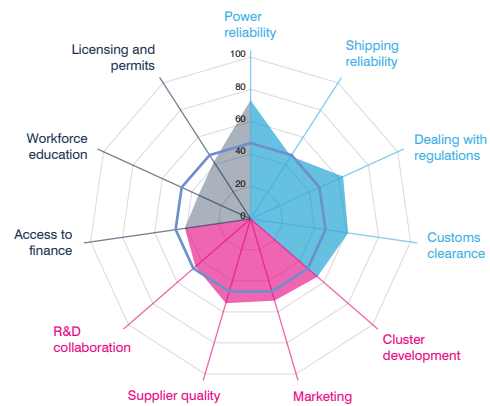
FIRM CAPABILITIES (Normalized scores)

Compete	Small	Medium	Large	All
International quality certificate	21.6	51.6	75.7	45.0
Bank account	60.8	55.3	54.8	57.8
Capacity utilization	48.5	31.3	29.2	35.6
Managerial experience	69.1	64.9	64.5	66.8
Connect				
E-mail	78.3	84.6	68.7	79.2
Firm website	61.9	66.8	69.6	64.7
Change				
Audited financial statement	34.2	47.6	47.6	40.8
Investment financed by banks	67.2	62.8	81.6	67.2
Formal training programme	25.3	34.9	61.9	33.9
Foreign technology licences	45.3	59.6	57.3	54.8



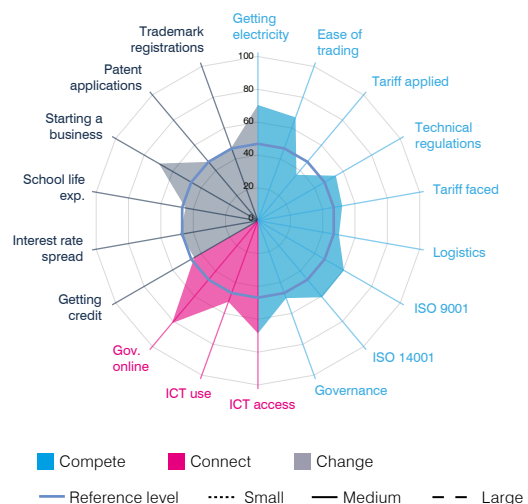
BUSINESS ECOSYSTEM (Normalized scores)

Compete	Small	Medium	Large	All
Power reliability	73.3	68.0	68.0	73.3
Domestic shipping reliability	38.6	52.4	58.2	46.0
Dealing with regulations	65.9	58.9	64.4	62.9
Customs clearance efficiency	-	59.9	61.3	61.0
Connect				
State of cluster development				54.8
Extent of marketing				52.7
Local supplier quality				54.4
University-industry collaboration in R&D				45.1
Change				
Access to finance	38.2	44.1	44.3	41.1
Access to educated workforce	29.6	41.6	43.5	35.4
Business licensing and permits	35.8	49.8	50.5	42.0



NATIONAL ENVIRONMENT (Normalized scores)

Compete	All
Getting electricity	70.5
Ease of trading across borders	67.0
Applied tariff, trade-weighted average	36.5
Prevalence of technical regulations	54.8
Faced tariff, trade-weighted average	52.1
Logistics performance index	50.0
ISO 9001 quality certificates	60.5
ISO 14001 environmental certificates	60.8
Governance index	50.2
Connect	
ICT access	68.6
ICT use	52.5
Government's online service	81.4
Change	
Ease of getting credit	44.8
Interest rate spread	48.1
School life expectancy	44.7
Ease of starting a business	69.6
Patent applications	46.8
Trademark registrations	47.4



Note: Scores range from 0 to 100, a higher score indicates a better outcome. Series with missing data are indicated as (-) in the tables and omitted from the radar charts.

Source: World Bank Enterprise Survey (2013) for firm level data; for other sources and methodology see Annex.

SME Export Potential

Morocco is a lower-middle income country with a population of 33.8 million and GDP of \$104.9 billion. Goods and services account for 60.8% and 39.2% of exports, respectively.

The country's unrealized potential to increase existing exports of goods lies outside its home region, notably to Europe (see table below). *Parts of aeroplanes or helicopters, ignition wiring sets, and electric conductors* have increased export potential to Europe, Asia and the Americas.

Regarding new export products, Morocco has diversification opportunities in fertilizers, ceramic articles, as well as apparel and textiles with products such as *urea and tableware and kitchenware*. These goods score relatively well on the price stability indicator. Other identified products are *woven fabrics containing predominantly polyester staple fibres, and men's or boy's jackets and blazers of wool*.

Small firms in Morocco perform well in using e-mails and access to electricity. They underperform, however, in owning international quality certificates. This category is also the largest performance gap between small and large firms. The country's national environment scores well in getting an electricity connection and the online services provided by the government.

Unrealized potential: Existing export products

Product description	Product code	Exports (\$ million)	Value of unrealized potential exports by destination (\$ million)					Development indicators					
			Africa	Americas	Asia	Europe	Oceania	Price stability	SME presence	Women employed	Technology		
			0 750	0 750	0 750	0 750	0 750						
Parts of aeroplanes or helicopters, n.e.s. (excluding those for gliders)	880330	229											
Ignition wiring sets and other wiring sets for vehicles, aircraft or ships	854430	1477											
Electric conductors for a voltage <= 1.000 V, insulated, fitted with connectors, n.e.s.	854442	529											
Diammonium hydrogenorthophosphate "diammonium phosphate" (excluding that in tablets...	310530	835											
Motor cars and other motor vehicles principally designed for the transport of persons, incl. station...	870331	430											
Octopus "Octopus spp.", smoked, frozen, dried, salted or in brine	030759	347											
Fresh or dried mandarins incl. tangerines and satsumas, clementines, wilkings and similar citrus...	080520	368											
Footwear with outer soles of rubber, plastics or composition leather, with uppers of leather...	6403XX	238											
Ammonium dihydrogenorthophosphate "monoammonium phosphate", whether or not...	310540	715											
Motor cars and other motor vehicles principally designed for the transport of persons, incl. station...	870322	381											

Notes: Unrealized potential table: Top 10 products in decreasing order of unrealized export potential to the world. **Exports:** Average value over 2011-2015. **Price stability, SME presence, and Women employed:** Green - performance above a country's trade-weighted mean. Red - the opposite. **Technology:** Green - transformed products exported by countries at least matching the country's per capita GDP. Red - the opposite. Blank spaces - data not available.

Source: ITC Export Potential Map, <http://exportpotential.intracen.org>