



아프리카지역 불어권 5 개국
(알제리, 튀니지, 모로코, 세네갈, 코트디부아르)
협력방안 연구 : 모로코

Abstract



Korea is still lacking in information and research for the developing countries. In particular, those on Morocco which is Arabic-French speaking and Islamic country, are more scarce. So as a donor country, we need to strengthen the concerned capacity to establish the strategies of development cooperation support by comprehensive study on Morocco.

This study aims at establishing a framework of the basic strategy and specific practice plans of the KOICA's ODA by investigating the development circumstance and national development strategies in Morocco and the development cooperation done by Korea and the international community so far.

To this end, this study did a quantitative analysis, literature review, expert group meetings, fieldwork etc. This study has the following significance; the first, we quantified the development needs of Morocco and the assistance capacity of Korea (based on the difference between the sectoral key indicators and the benchmark countries), and we comprehensively analyzed the development needs of Morocco through fieldwork.

"Jasmine Revolution" in 2011 has had a considerable influence even in Morocco. In March 2011, the Moroccan government announced a plan for constitutional reform and in July the same year, a national referendum on constitutional amendments was conducted in a short period of time. This rapid response enabled the Moroccan regime to avoid a wave of revolution. Unlike the expectation that there would be big changes in Morocco due to the Jasmine Revolution, it seems to maintain political and social stability so far.

Morocco's GDP in 2012 was \$ 96.1 billion, GDP per capita was \$ 2,956, and economic growth rate of 2.7% was recorded. Structurally Moroccan economy is built around the low productivity of agriculture and domestic demand based industries.

Morocco's agricultural sector has provided about 40% of total employment by 2012. Agriculture is the backbone of the Moroccan industry. However, agriculture in Morocco has shown a typical small-scale artisanal forms. In addition, 85.7% of the total agricultural land is in a state without irrigation.

Except for Nigeria, Morocco has the most abundant fishery resources in the African continent. The main species are sardines, anchovies, mackerel, cod, snapper, squid and so on. Harvested products are mostly processed into frozen or canned products, then mainly exported to Europe.

Morocco has imported a required total amount of energy. Dependence on foreign energy sources is a serious level of 97%, and electricity demand has increased by 8% every year. So Moroccan government is committed to a stable supply and diversification of energy sources. Morocco's main exports are clothing, socks, etc. and imports are crude oil, petroleum, gas oil, etc. Trade partners are mainly the European countries but Moroccan government has recently tried to diversify trading partners such as China, India, Russia, Brazil and the emerging economies.

In the MDG, Morocco can be evaluated as a country that has achieved the overall absolute poverty and hunger eradication. In addition, Morocco has almost reached the MDG target in most areas, but unemployment, HIV/AIDS and health issues and environmental issues (especially on air pollution) are still needed to be further improved.

According to the HDI data, Morocco is ahead in terms of employment in comparison with Tunisia and Algeria, but social aspects, that is, education and gender equality are put relatively low valuation. According to the Transparency International, Morocco's 2013 Corruption Perception Index (CPI) took 37/100 points which is below the world average (43/100 points) and the 91st place

among 177 countries. The human rights and civil society participation in 2012 belong to the very low 40th among 52 countries in the world.

The major problems like high illiteracy rate, high unemployment rate, serious regional disparities, poor living infrastructure should be dealt with urgently to promote the development of Morocco. To cope with these problems, Morocco has focused national development strategy (NDS) to promote the national vocational training and employment, and promote national programs for growth and regional development of rural areas.

Industrial development plan in sectoral development strategy of Morocco (Plan Emergence) is that it will strengthen the industry as a dynamic organization and increase its competitiveness, and concentrate industrial policy measures on areas having comparative advantage. To this end, the seven strategic areas such as automotive, electronics, seafood processing, aviation, textile and leather and food were selected.

Agricultural Development Plan (Plan Maroc Vert) is that it rebuilds underdeveloped agricultural infrastructure of Morocco, expands irrigation facilities and infrastructure and specifies the local agricultural base city in order to achieve an efficient agricultural development.

Fisheries Development Plan (Plan Halieutis) is that it reduces an informal employment, and increases a fish consumption in the domestic market and exports. The plan contains the details to construct a fishing port, to maximize the value of fishery products for export.

Tourism Development Plan (Plan Azur) sets a goal that the tourism industry plays a role as a motive power of economic, social and cultural development by 2020.

The goal of the Human Development Plan (INDH) launched by the King Mohammed VI is to alleviate poverty and social exclusion through education and skills development. The plan emphasizes the creation of a new governance based on a human-centered public policy and participation to achieve democracy and development. Thus it induces an effective participation of civil society in all decision-making stage.

Commercial development plan (Programme Rawaj) is to provide a good quality of commercial services to consumers, and to build a logistics system which can meet the various needs of consumers. For this purpose, the plan is to advance the commercial training suitable for each sector of commerce and to strengthen information systems to protect consumers.

Craft Industry Development Plan (Artisanat du Maroc) has goals as follows; a creation of new jobs, an increase of GDP, an improvement of Moroccan handicraft products to meet the domestic and foreign customers tastes, a preparation of major retail space in the tourist area, and a development of modern distribution network etc.

For the last 12 years, France has supported Morocco the most in terms of ODA amount, then Germany and Japan are following suit. Looking into the ODA of multilateral entities for the past 12 years, the EU has supported the most, then the Arab Fund, the CIF have followed.

The AFD of France has been supporting Morocco for the three goals; ① improve the competitiveness of the economy and the quality of jobs, ② solve the social and regional disparities, ③ set the sustainable growth conditions, such as contributing to environmental preservation. The cooperation between France and Morocco has been done based on the priorities set by the Inter-ministerial Committee for International Cooperation and Development and

the Prime Minister talks of the two countries. The focused support areas of France have been transport and logistics storage, education, industry, mining, construction and drinking water. Inter alia, the average support amount for three years from 2011 to 2013, shows that it focused more on education, transport, logistics storage areas.

The development cooperation objectives of the United States are ① workforce development, ② water and sanitation improvement, ③ education support, ④ development of governance and democracy, ⑤ youth development. The focused support areas of the USAID have been the agriculture, forestry and fishery sector and then education, civil society and public safety, drinking water in order.

The direction of Japan's support in Morocco, has the three priorities, such as ① economic development, ② agriculture development, ③ South-South cooperation. Recently, the JICA has focused on support for transport and logistics sector, education, drinking water, sanitation, and the agriculture-fisheries-forestry in order.

In sectoral budget share of the EU for supporting Morocco, ① 30% of the aid amount was supported for access to all the basic social services, ② its 25% was supported for the development of democratic governance, constitutional state and social changes, ③ 25% was for employment and sustainable and inclusive growth, and ④ 20% was for empowerment sector and civil society, etc. Overall, the EU's focused support sectors are transportation logistics, education, energy, industry, mining and construction.

The Arab Social and Economic Development Fund (AFESD) has supported Morocco by providing basic service and by improving production capacity and investment environment with priority on infrastructure. Most of the AFESD's ODA

is loan and the majority, that is, over 90% of ODA funding has been allocated for transportation and logistics storage.

Overall the ODA of the international community for Morocco has focused on the sector of education and water sanitation, transport and energy, agriculture-fisheries-forestry. In particular, the donor countries or institutions that the ODA loans' ratio is higher than that of grants, for example, France, the EU, Japan, the AFESD, etc. have mainly puts a lot of emphasis on building economic infrastructure such as traffic road, etc. In contrast, the countries or institutions that put more emphasis on grants, such as the United States, tend to concentrate on their support for the sectors of agriculture, education, governance, etc.

In the case of the KOICA's assistance for three years (2009-2012), the support scale in education was the largest (about 13.1 billion Won). The support scales in other sectors are as follows; public administration (approx. 5 billion Won), energy industry (about 1.7 billion Won), health care (about 1.0 billion Won), agriculture-forestry-fisheries (approximately 460 million Won), the emergency relief (about 90 million Won), and others (approx 130 million Won). In the latest support status of the KOICA, the following projects were successfully carried out; Casablanca cars vocational training support, Moroccan cyber security center development, Trade capacity building, Enhancement for industrial statistics measurement and capacity building of its utilization, Establishment of research infrastructure for improving the solar energy efficiency, etc. In addition, Korean Ministry for Agriculture, Food and Rural Affairs, Ministry of Education, the Korea Communications Commission, etc. also have supported Morocco.

Morocco has been facing the following difficulties; high illiteracy, high unemployment, high energy costs, serious income disparity and large regional gaps. Therefore, it is proposed that the KOICA sets up a goal for promoting

market economy and alleviating economic and social inequality. Also, the KOICA's strategic priorities are suggested as follows; 1) mitigating illiteracy rate and public administration capacity building, 2) strengthening national industry competitiveness and stabilizing the power supply.

To select focus sectors for supporting, the quantitative and qualitative evaluations were attempted. As a result, education was selected as the best focus sector for supporting, and then public administration and energy industry were followed in order.

In the case of education, the following have been proposed; establishment of literacy education institutions to expand access for literacy education, support for vocational training center-entrepreneurship center for national industrial training, and Korean language support for secondary schools.

In the case of public administration sector, it is suggested to build up the e-government system for government efficiency and policy oriented capacity building and to support civil service capacity building.

In the case of industrial energy, it is proposed to conduct feasibility study for water resources management improvement and strengthen the capacity for renewable energy development. This can be promoted through cooperation in the form of technical cooperation in relevant areas such as research institutes, international organizations.

It is advisable to cooperate with the advanced donor countries, such as France to improve aid effectiveness in Morocco. For the successful cooperation with them, it is pre-required to adequately train local Korean experts who can communicate and work in French with the locals.