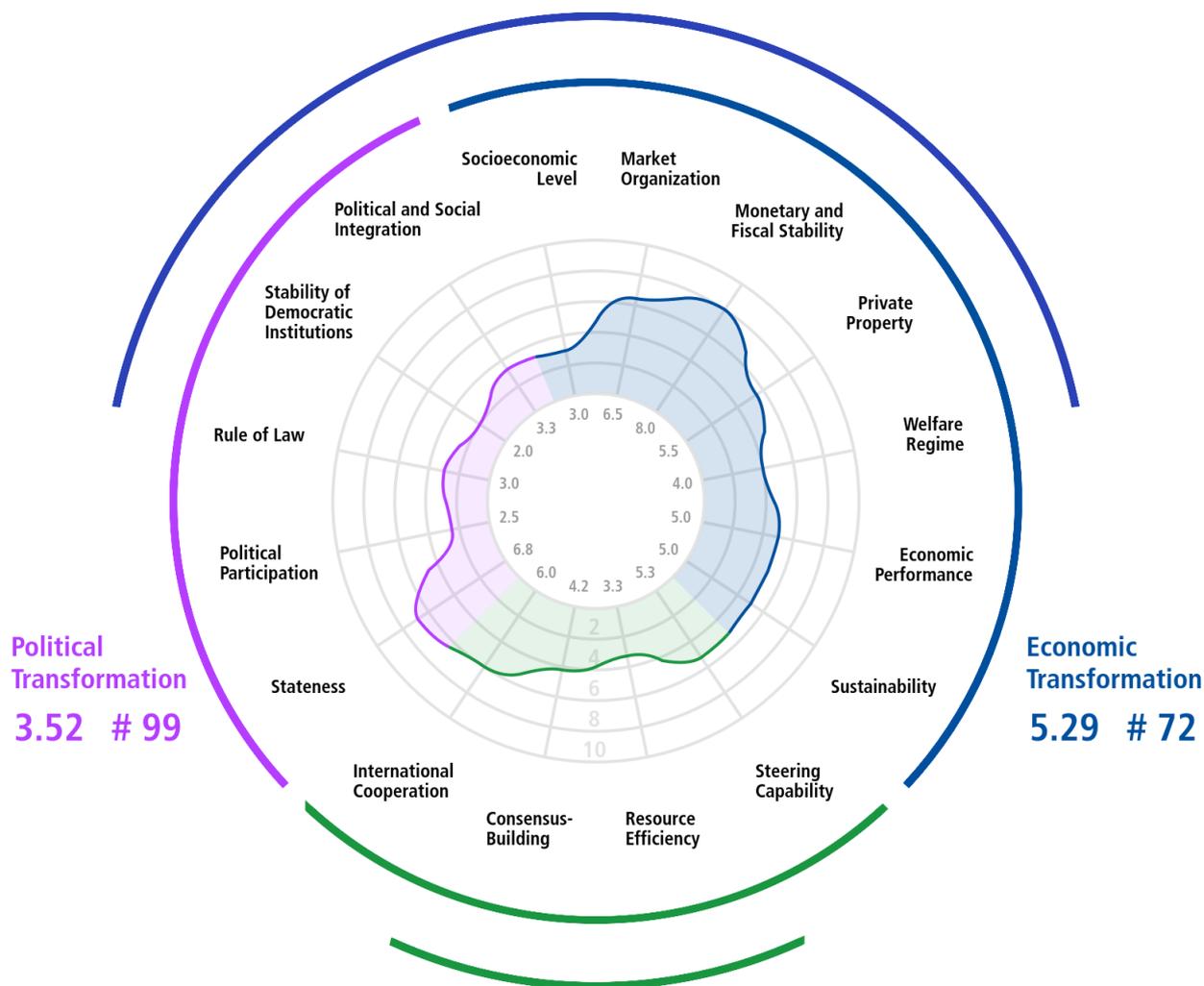


Morocco

Status Index

4.40 # 91

on 1-10 scale out of 137



Governance Index

4.26 # 84

on 1-10 scale out of 137

This report is part of the **Bertelsmann Stiftung's Transformation Index (BTI) 2026**. It covers the period from February 1, 2023 to January 31, 2025. The BTI assesses the transformation toward democracy and a market economy as well as the quality of governance in 137 countries. More on the BTI at <https://www.bti-project.org>.

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Key Indicators

Population	M	38.1	HDI	0.710	GDP p.c., PPP \$	10305
Pop. growth ¹	% p.a.	1.0	HDI rank of 193	120	Gini Index	39.5
Life expectancy	years	75.3	UN Education Index	0.625	Poverty ³	% 9.8
Urban population	%	65.6	Gender inequality ²	0.438	Aid per capita \$	20.5

Sources (as of December 2025): The World Bank, World Development Indicators | UNDP, Human Development Report 2025. Footnotes: (1) Average annual growth rate. (2) Gender Inequality Index (GII). (3) Percentage of population living on less than \$3.65 a day at 2017 international prices.

Executive Summary

During the review period, Morocco's leadership focused more on boosting the country's international reputation and national prestige than on implementing inclusive or sustainable development policies. Under King Mohammed VI, two priorities dominated the government's agenda: football and the Western Sahara. Both served as tools of soft power to enhance Morocco's global image, foster national unity and rally the population around the flag. Morocco's successful bid to co-host the 2030 FIFA World Cup with Spain and Portugal exemplifies its efforts to assert its global standing, but it also underscores a focus on soft power initiatives rather than meaningful political reform. Soft power has served to divert attention from pressing political and socioeconomic issues, particularly the government's failure to address the country's political and economic challenges. These symbolic achievements, while boosting national pride, have obscured critical debates around democratization, economic equity and governance reform. Instead, they have helped consolidate the power of the monarchy, which continues to control both domestic and foreign policy. The king has been personally involved in football governance, overseeing the construction of world-class stadiums with opaque budgets, which has strengthened a narrative of national renewal while deflecting criticism of poor governance, economic inequality and social injustice.

Since Morocco's historic run to the semifinals at the 2022 World Cup in Qatar, football has been used to project a modern, dynamic image abroad. This focus on football has been used to "whitewash" more authoritarian tendencies and downplay internal challenges such as rising unemployment, inequality and human rights violations. Frequent advertisements promoting Morocco's role in organizing the 2030 FIFA World Cup and the opportunities it represents serve as a tool for the government to reassert control over public sentiment.

The Western Sahara issue remains central to Morocco's diplomacy and domestic politics. It continues to unify the population around the monarchy and divert attention from domestic problems. The government's continued focus on this issue has effectively sidelined calls for democratization and inclusive economic growth. Additionally, Morocco's overt normalization

with Israel has marked a major geopolitical shift, sparking both support and opposition. While officials frame normalization as a strategic move, opposition groups – particularly Islamists and the left – have condemned it as a betrayal of the Palestinian cause.

During the review period, the monarchy maintained a firm grip on power, favoring a top-down approach to governance. However, the king's public presence has notably diminished, reportedly due to health concerns, fueling speculation that the Makhzen's inner circle and the security services are increasingly steering state affairs. The growing role of security forces and intelligence agencies in shaping political decisions and suppressing dissent has reinforced authoritarian tendencies.

The royal pardon of several journalists was a calculated gesture aimed at improving Morocco's image amid international human rights criticism. It did not signal a genuine shift toward broader reforms but instead provided temporary relief from mounting public dissatisfaction. At the same time, nationalism has been reactivated as a key political tool, fostering unity but also suppressing critical voices.

On the economic front, Morocco has made incremental progress in modernizing its infrastructure and diversifying its economy, particularly in renewable energy and tourism. However, these advances fell short of addressing systemic inequalities and fostering inclusive growth. A form of unregulated capitalism has deepened social disparities, with high unemployment, especially among youth, and widespread economic inequality remaining significant issues. Inflationary pressures, stagnant wages and rising prices of basic goods have strained household purchasing power, while rural communities continue to face marginalization. Economic policy has failed to challenge the entrenched interests of the Makhzen or to meaningfully redistribute wealth.

Mounting social inequality and political repression heighten the risk of future unrest. The widening gap between the state's projection of modernity and citizens' everyday economic and political realities could fuel new waves of dissent.

History and Characteristics of Transformation

Following Morocco's independence in 1956, King Mohammed V sought to consolidate his rule but soon faced growing political competition. Under King Hassan II, a multiparty system was deliberately engineered to fragment the political landscape and weaken opposition forces. His reign (1961 – 1999) became synonymous with the Years of Lead, a period marked by repression of dissent and systematic human rights abuses. Hassan II centralized power across all branches of government – the judiciary, legislature and executive – and further tightened control after two failed coups in the early 1970s. In the 1980s, Morocco witnessed a surge in social movements driven by economic hardships, rising inequality and political discontent. Widespread protests, fueled by austerity measures and deteriorating living conditions, were met with severe crackdowns.

During this period, progressive parties, including the Socialist Union of Popular Forces (USFP) and the Party of Progress and Socialism (PPS), played a crucial role in pushing for democratization, social justice and constitutional reforms. They challenged the monarchy's absolute authority. However, their efforts were systematically blocked by state repression, electoral manipulation and the co-optation of opposition figures. Despite brief openings, they failed to secure real power.

In response to growing domestic and international pressure in the 1990s, Hassan II introduced political and economic liberalization efforts. Economic decline and the rise of political Islam pushed the monarchy to engage with opposition parties and bring them into government. Constitutional reforms were introduced, establishing a bicameral parliamentary system and expanding freedoms of expression and the press. However, these reforms left the monarchy's dominance intact.

When Mohammed VI ascended to the throne in 1999, he promised greater openness and reform. He sought to address past human rights abuses through the Equity and Reconciliation Commission and initiated family code reforms in 2004 to strengthen women's rights. He continued liberalization and modernization efforts begun under his father, expanding privatization and investing heavily in infrastructure, renewable energy and manufacturing. Yet, as the palace maintained control over political life, progressive parties lost ground, becoming fragmented and increasingly irrelevant. The opposition – once rooted in strong ideological and grassroots movements – became weakened and fragmented.

Following the 2011 uprisings, the monarchy introduced constitutional reforms to expand the powers of the head of government and parliament, recognize Amazigh as an official language and strengthen civil liberties. In practice, however, the monarchy retained significant influence over policymaking and maintained extensive powers over the executive, legislative and judicial branches. This “façade of democracy” allowed the monarchy to project an image of reform and modernity while preserving its dominance over the state apparatus. Meanwhile, political parties gradually became weaker and more politically irrelevant, failing to act as effective opposition forces or to channel public discontent into meaningful institutional change.

Persistent socioeconomic inequality, recurring droughts and mounting repression have fueled protests in recent years, exposing the limits of Morocco's reform narrative. Corruption and entrenched patronage networks continue to undermine progress, exposing the gap between the monarchy's promises and the lived experience of many Moroccans. At the same time, the monarch's absence from the public sphere, reportedly due to health problems, has fueled speculation that governance increasingly rests with inner circles of the Makhzen rather than the monarch himself.

The BTI combines text analysis and numerical assessments. The score for each question is provided below its respective title. The scale ranges from 1 (worst) to 10 (best).

Transformation Status

I. Political Transformation

1 | Stateness

The Moroccan state maintains a relatively strong, though not absolute, monopoly on force, facing challenges in rural and peripheral regions. The Rif region has a long history of resistance, but recent unrest has been driven more by socioeconomic grievances than by direct opposition to central authority. In September 2023, the Rif Nationalist Party (PNR) was founded, calling for independence and condemning state repression.

Western Sahara remains a major challenge, with the Polisario Front, backed by Algeria, disputing Moroccan sovereignty. Despite heavy state investment in administration, development projects and military oversight, sporadic clashes persist, reflecting the enduring depth of local grievances. Morocco also claims the Spanish-controlled enclaves of Ceuta, Melilla, Peñón de Vélez de la Gomera and other small Mediterranean islands, adding another layer to its territorial disputes.

Nearly all parties recognize Morocco as a nation-state. Its population is primarily Amazigh and Arab, with smaller communities of Sahrawis, Jews and sub-Saharan migrants. While most accept the nation-state's legitimacy, identity issues persist. The Amazigh seek greater cultural and political inclusion, despite recognition in the 2011 constitution. Sahrawis remain divided – some accept Moroccan rule, while others mobilize for self-determination.

Citizenship is based on descent (*jus sanguinis*), but sub-Saharan migrants face racial discrimination and barriers to naturalization.

Justice and Kindness (*al-Adl wal-Ihsane*), a long-standing Islamist association, has shifted its stance. Once seen as advocating an Islamic state, it now expresses interest in forming a political party – on the condition of democratic governance and a monarchy with only symbolic powers.

Question
Score

Monopoly on the
use of force

8



1

State identity

7



1

Morocco's legal and political systems are largely secular but incorporate Islamic norms. Secular laws, rooted in French colonial traditions, govern most aspects of life, while Islamic laws based on Sunni Islam remain central to family law, inheritance and personal status.

The constitution declares Islam as the state religion while guaranteeing freedom of thought, though it recognizes only Islam, Christianity and Judaism. Religious interpretation is restricted to the Maliki school of Sunni Islam.

As “Commander of the Faithful” (Amir al-Mu'minin), the king holds both religious and political authority, overseeing Islamic practices through the Ministry of Endowments and Islamic Affairs. This role reinforces his political power and legitimacy.

The constitution bans political parties based on religion, ethnicity or region and prohibits any challenge to Islam's status as the state religion – ensuring the monarchy's dominance in both religious and political spheres.

Morocco has established administrative structures across nearly the entire country, providing basic services. However, despite decentralization efforts, the Ministry of the Interior retains significant control. Centralization, bureaucratic complexity and overlapping responsibilities hinder access to services, which many citizens perceive as rigid and inefficient. The privatization of state services, particularly in water and electricity, has introduced new challenges, including affordability and unequal access.

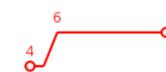
Infrastructure expansion has improved public services, with electricity reaching 100% of the population by 2022. However, rural areas still face disparities, especially in water access, where outdated infrastructure and climate vulnerability worsen scarcity. Although the state has implemented water-saving measures, poor resource management and the promotion of water-intensive crops under the Green Morocco Plan continue to strain supply. Insufficient road and rail networks further limit service accessibility in remote regions.

The September 2023 earthquake exposed administrative weaknesses, as many affected communities experienced delayed aid. As of early 2025, some families remain in makeshift shelters, highlighting ongoing gaps in disaster response and public service provision.

No interference of religious dogmas

6

'06 _____ '26 10



_____ 1

Basic administration

6

'06 _____ '26 10



_____ 1

2 | Political Participation

National and local elections in Morocco are held regularly, with parliamentary elections every five years and local elections every six. The most recent elections, on September 8, 2021, saw victories for the National Rally of Independents (RNI), the Party of Authenticity and Modernity (PAM) and the Istiqlal Party (PI), though irregularities were reported.

Despite regular elections, Morocco remains a pseudo-democracy. Voter absenteeism, especially among youth, reflects disillusionment with institutions seen as corrupt and ineffective. Elections rarely lead to real political change, as the king retains executive power and elected bodies remain constrained by the Makhzen, that is, the monarchy and its inner circle.

More than 30 parties compete for parliamentary seats but, to survive, they must align with the monarchy's agenda. State-controlled media limits opposition visibility, reinforcing the democratic façade while real power remains firmly in royal hands.

Morocco is an executive monarchy where elected representatives hold limited power compared to the king and his advisers, who retain ultimate authority over strategic policies. As head of state, the king presides over the Ministerial Council, controls national security and religious affairs and approves key legislation. His royal decrees (dahirs) are immune to debate or legal accountability, and his speeches set the government's agenda.

To maintain control, the king appoints loyal technocrats to the “ministries of sovereignty,” including Interior, Foreign Affairs, Islamic Affairs and Defense. The Makhzen, an elite inner circle operating outside constitutional accountability, functions as a shadow government, thus ensuring the monarchy's influence over decision-making.

The monarchy fragments and co-opts opposition parties, ensuring parliament remains subservient. In March 2023, the palace reprimanded the Justice and Development Party (PJD) for criticizing the normalization deal with Israel, reaffirming that foreign policy is the *domaine réservé* of the king. The move signaled the monarchy's unwillingness to tolerate challenges and its efforts to monopolize political discourse – particularly as the PJD's stance on Palestine risked mobilizing public support.

This opaque system sidelines elected institutions, eroding their legitimacy. As a result, many Moroccans disengage from formal politics, favoring street protests over participation in a system seen as subservient to the monarchy.

Free and fair elections

3

'06 '26 10



Effective power to govern

2

'06 '26 10



Morocco's constitution guarantees freedoms of assembly, association and political membership, but in practice these rights are heavily restricted. In December 2024, the house of representatives approved a strike law allowing authorities to seek urgent court orders to suspend strikes. Unions argue it imposes severe limitations and was fast-tracked without proper consultation. The regime continues to undermine rights, particularly for those addressing sensitive issues like the monarchy, religion or Western Sahara.

Morocco is home to about 30,000 to 50,000 civic and political groups, but many face significant obstacles. Organizations advocating for Amazigh, LGBTQ+ and immigrant rights, or those critical of Islam and the monarchy, often struggle with registration denials. Sahrawi human rights groups are routinely barred, and the Sahrawi Association of Victims of Grave Human Rights Violations (ASVDH) has been unable to operate since 2022. Amnesty International has been banned from conducting research in Morocco since 2015. Bureaucratic restrictions, legal harassment and intrusive surveillance target independent NGOs and activists, forcing groups to align with state priorities to secure funding.

Unauthorized protests are often met with police brutality, particularly in Western Sahara, where security forces routinely outnumber demonstrators. In September 2023, authorities violently dispersed protests in Laâyoune during a visit by U.N. envoy Staffan de Mistura. Pro-Palestinian demonstrations after October 2023 were tolerated, but repression intensified against activists critical of normalization with Israel. In November 2023, members of the Boycott, Divestment, Sanctions (BDS) movement were arrested for protesting a French supermarket chain, with several sentenced to six months in prison.

Repression in Morocco aims to silence dissent, particularly on issues concerning the monarchy, foreign policy and economic interests.

Morocco's constitution guarantees "freedom of opinion and expression in all its forms" under Article 25. However, severe restrictions persist. The judiciary is frequently used by the monarchy to punish activists, journalists and lawyers critical of the government, the monarchy, normalization with Israel or corruption, often prosecuted under the penal code.

State censorship is enforced through intimidation, harassment, surveillance and legal provisions that criminalize speech critical of the monarchy, state, national unity or public officials. Criticism of Islam remains a red line. Many journalists self-censor to secure accreditation, avoid prosecution and protect themselves and their families. According to Freedom House's 2023 report, those covering economic and social issues face fewer restrictions than those reporting on politics.

Association / assembly rights

3



Freedom of expression

2



While independent media exist, political plurality is absent. The state and Makhzen control major outlets, ensuring alignment with the regime’s discourse. An independent press is now almost entirely absent. Many journalists have lost professionalism and legitimacy, while social media – especially from abroad – has become a rare space for freer expression.

Critical voices face harassment, assault and arbitrary detention. Trials are often politically motivated. In 2023, Rida Benotmane was sentenced to 18 months for demanding the release of political prisoners. Abderrahmane Azenkad and Said Boukioud received five-year sentences for opposing normalization with Israel. Saida El Alami was sentenced to two years for “insulting the king,” while Mohamed Ziane remains imprisoned.

Repression extends beyond local journalists. In September 2023, police arrested and deported French journalists Quentin Müller and Thérèse Di Campo for reporting on Western Sahara. Authorities continue to use Pegasus spyware to monitor journalists and activists, with Moroccan dissidents joining a lawsuit against NSO Group in the United States, underscoring the transnational reach of repression.

On July 29, 2024, journalists Taoufik Bouachrine, Omar Radi and Soulaymane Raissouni were pardoned alongside exiled journalists. The move sought to improve Morocco’s international image, promote the Sahara autonomy plan and ease domestic tensions. However, it was a political maneuver rather than a genuine commitment to press freedom. Less internationally known journalists and Hirak Rif protesters remain imprisoned, highlighting the persistence of repression.

3 | Rule of Law

The monarchy continues to function as the actual chief executive, particularly in strategic areas such as foreign policy, security and religious affairs. The king presides over the Ministerial Council, where major policy decisions are made. He exercises legislative powers through dahirs – royal decrees – which are immune from judicial review and leave little room for effective checks and balances. He also has the power to veto key legislation.

The king ensures that parliament remains under his influence through both formal and informal mechanisms. He can dissolve parliament, fosters fragmentation and co-optation of political parties and leverages an extensive patronage system and control of the media to manage the political elite and discredit opposition voices. His speeches serve as directives for the government and political parties, shaping public policies and limiting parliamentary independence and effectiveness.

Ultimately, the king remains the final arbiter, holding authority over all branches of government. These royal prerogatives weaken the system of checks and balances and hinder the full realization of democratic separation of powers.

Separation of powers

2

'06 '26 10



In Morocco, the judicial system is divided into general jurisdiction courts that handle civil, criminal and commercial cases; specialized jurisdiction courts that deal with administrative disputes or labor issues; and special courts that address sensitive matters, including issues involving national security.

The judiciary is officially defined as independent of the legislative and executive powers, and the constitution promises autonomy for courts and protection from external interference. It also pledges judicial independence, ensuring that judges cannot be arbitrarily removed or dismissed.

The Higher Judicial Council, tasked with evaluating the judiciary, remains under monarchical control. The king chairs the council while simultaneously overseeing judicial appointments through royal decrees. The selection of judges lacks transparency, and there is little clarity on who is appointed to the council and by what criteria, raising concerns that political considerations outweigh merit or competence.

The king also retains the power to issue royal pardons, overriding judicial decisions without accountability. Courts continue to be used to target political dissidents and human rights activists, further undermining judicial independence.

In practice, royal prerogatives severely limit the judiciary's independence, eroding public trust in the legal system and its ability to serve as a check on executive power.

Morocco's legal framework criminalizes corruption, but a lack of accountability fosters impunity and weakens the rule of law. Corruption remains endemic – deeply rooted in state institutions and central to the regime's functioning. The lack of political will to confront entrenched elite interests continues to erode public trust.

The government's anti-corruption efforts are inconsistent. The 2023 drug-trafficking scandal, which implicated high-ranking officials, exposed the nexus between politics, business and crime. Yet, the monarchy and its entourage remain exempt from scrutiny. In December 2023, Aziz Akhannouch was accused of a conflict of interest for securing a government contract for his company in the Casablanca-Settat desalination project, reinforcing perceptions of elite impunity.

Authorities have yet to hold security forces accountable for the deaths of 37 migrants and the disappearance of 76 others in Melilla (June 2022), underscoring the state's reluctance to address corruption. Public officials are rarely prosecuted, with 74% of Moroccans believing corruption is widespread (2024 Arab Barometer).

The 2023 earthquake further exposed corruption through allegations of fund mismanagement, bribery and favoritism in reconstruction contracts.

Independent judiciary

2

'06 _____ '26 10



Prosecution of office abuse

4

'06 _____ '26 10



Morocco's constitution formally guarantees equality, liberty and protection from inhumane treatment, but enforcement remains weak. NGOs continue to report serious human rights violations, including torture, arbitrary detention and cruel treatment, particularly targeting pro-independence activists in Western Sahara.

In January 2025, activist Said Ait Mahdi was sentenced to three months in prison for protesting the government's earthquake response. His case, widely condemned as arbitrary, highlights the risks of opposing the state.

Prison overcrowding remains critical, with the population exceeding 158% of capacity by late 2023, 42% of whom were pretrial detainees.

Women face systemic inequities in inheritance and property rights, with patriarchy shaping access to education and health care. In 2024, the king proposed family code reforms to set the marriage age at 18 and allow divorced women to retain custody if they remarry, but inheritance laws remain unchanged.

Article 489 of the Penal Code punishes same-sex relationships with up to three years in prison. LGBTQ+ individuals face widespread discrimination, including arrests for alleged same-sex activities and raids on LGBTQ+ events in 2024. In October 2023, a minor raped by a muezzin was sentenced to six months for same-sex relations, while the muezzin received eight years' imprisonment.

Sub-Saharan migrants and refugees continue to face barriers to residency and work permits despite government efforts to regularize their status.

4 | Stability of Democratic Institutions

In Morocco, democratic institutions exist but remain constrained by the monarchy's dominant role in governance. Efforts toward decentralization and accountability lack strong, independent institutions, making reforms largely symbolic. The monarchy's executive powers limit the national government's effectiveness.

Royal commissions, appointed by the king, oversee national projects and reforms, often holding more power than ministries. As part of the Makhzen, the royal cabinet – composed of the king's closest advisers – shapes policies and influences governance beyond legal review.

While parliament can pass laws, the monarchy dominates through political prerogatives, the Makhzen elite and the royal cabinet. The king's speeches set the legislative agenda. The judiciary struggles with independence, especially in cases tied to royal interests. Public administration suffers from patronage and corruption, undermining service delivery.

Despite regionalization reforms, centralized royal control weakens local democratic governance.

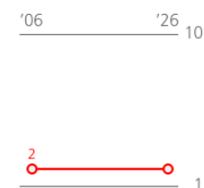
Civil rights

4



Performance of democratic institutions

2



Democratic institutions exist in Morocco and, in principle, are accepted by various actors. However, the power dynamics between the king and formal democratic structures undermine the legitimacy of these institutions in the eyes of the public and international observers. Both formal and informal mechanisms ensure that they remain subservient to the monarchy, further diminishing their legitimacy. While civil society and political parties can advocate for reforms, the Makhzen often manages to segment, fragment or co-opt these groups, ensuring they are unable to challenge the king's authority. Low voting rates, particularly among the youth, and disengagement from civic associations stem from the perception that these institutions are not truly representative or empowered to defend the public. The legitimacy of local institutions is compromised by the monarchy and the central administration's overarching powers, which constrain their ability to serve citizens and address community needs.

At the international level, Morocco reaffirms its commitment to democratization, but this remains largely rhetorical, as its actual record is mixed. Recent efforts to free political prisoners and improve women's rights are part of this strategy, aimed at reassuring the international community that the country is committed to human rights and convincing them of the legitimacy of the autonomy plan for Western Sahara.

5 | Political and Social Integration

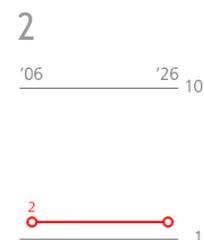
Morocco's political parties struggle to assert meaningful influence under the monarchy's dominant rule. The current government, formed after the 2021 elections, is led by the National Rally of Independents (RNI), with the Authenticity and Modernity Party (PAM) and the Istiqlal Party, a historical nationalist force, as key coalition partners. While Istiqlal remains influential, the coalition is largely dominated by the RNI and PAM, both seen as aligned with the monarchy.

The Justice and Development Party (PJD), once Morocco's leading political force, suffered a dramatic collapse in 2021. The party was seen as co-opted by the monarchy, lost credibility after signing the normalization agreement with Israel, and failed to deliver on its electoral promises. The PJD's fall reflects broader challenges facing political parties, which are organizationally weak, dependent on patronage networks and struggle to articulate societal interests.

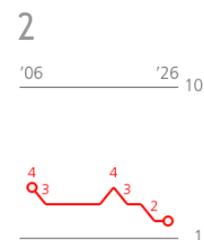
Leftist parties remain marginalized and fragmented. Hopes for a unified left collapsed in 2021 when the Unified Socialist Party (PSU) withdrew from the Federation of the Democratic Left (FGD). Meanwhile, the Justice and Charity (al-Adl wa al-Ihsan) movement, though illegal, retains significant influence but would need to negotiate with the monarchy for legal recognition.

Political mobilization largely occurs outside party structures, with youth and activists favoring protest movements and informal political engagement. Voter turnout has steadily declined since the 1970s, reflecting growing public cynicism. Many perceive parties as corrupt, serving the king's interests rather than the people's. This disillusionment fuels political apathy and disengagement from formal politics.

Commitment to democratic institutions



Party system



Structural, political and systemic constraints continue to limit the effectiveness of interest groups in Morocco.

The law permits anti-union discrimination, prohibits judges from forming trade unions, and excludes agricultural and domestic workers from labor protections. Collective bargaining is restricted, and trade unions, co-opted by the state, have lost credibility and leverage.

According to the International Trade Union Confederation’s Global Rights Index 2024, Morocco continues to obstruct union registration and violate the right to strike. Rural populations, minorities and women remain under-represented in advocacy efforts. The government continues to bar Al-Adl wa al-Ihsan, an Islamist association, from legal and political platforms.

While civil society struggles to exert influence, business interest groups shape parliamentary decisions, leveraging close ties with the monarchy to protect financial interests at the expense of labor rights and socioeconomic reforms.

The authoritarian system prevents interest groups from challenging the status quo. Authorities fuel competition among them, keeping them fragmented. The February 20 Movement in 2011 was a rare example of cross-sector collaboration.

Support for democracy in Morocco has grown significantly. According to the 2024 Arab Barometer, 73% of Moroccans believe democracy, despite its flaws, is “better than other systems,” a 54% increase from previous years. However, views on its effectiveness remain mixed – 35% see democratic regimes as “indecisive” while 33% find them “ineffective at maintaining stability.”

A multiparty parliamentary system remains the most preferred model (68% support it), yet 40% favor governance by Islamic law without elections, and 23% support an authoritarian system.

While support for democracy is growing, Moroccans are increasingly aware of Western double standards in applying democratic principles, particularly regarding race, religion and foreign policy. The unwavering Western support for Israel’s actions in Palestine, despite its violations of international law, has fueled skepticism. Many view the West’s failure to uphold democratic values consistently – defending democracy at home while ignoring Palestinian rights – as proof of hypocrisy.

Interest groups

4

'06 '26 10



1

Approval of democracy

n/a

'06 '26 10

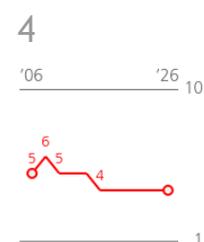
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1

The latest World Values Survey (WVS) Wave 7 (2017 – 2022) indicates moderate social trust, with lower interpersonal trust in urban areas compared to rural and close-knit communities. Family ties remain the primary source of support and trust, as many Moroccans view state institutions and civil society organizations (CSOs) as unresponsive.

While the number of CSOs is increasing, their actual influence remains unclear – whether they effectively shape policy and governance. Youth engagement in civic activities is low, with most young people participating in religious associations and poverty alleviation efforts rather than political organizations. Participation is generally higher in urban areas, where access and awareness are greater, but regional disparities limit engagement. Poverty, unemployment and restricted access to education and health care further weaken trust, social connections and collective action.

Social capital



II. Economic Transformation

6 | Level of Socioeconomic Development

Morocco's Human Development Index (HDI) in 2022 was 0.698, ranking 120th globally. Despite slight improvements, the country remains in the “medium human development” category, with persistent social inequalities in income, gender rights, education and regional disparities.

The 2024 Multidimensional Poverty Index (MPI) Report found that 6.4% of Moroccans live in multidimensional poverty, lacking access to essential services such as health care, education and adequate living conditions. An additional 42% are at risk of falling into poverty. Rural communities remain the most vulnerable, with urban households consuming nearly twice as much as rural ones.

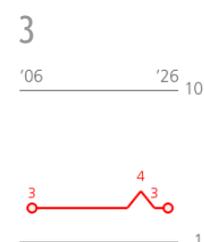
A 2024 World Bank report warns of rising poverty and vulnerability, driven by inflation, economic instability and climate-related challenges. The Ukraine war, droughts and high unemployment – especially among youth and women – have worsened living conditions, eroding previous poverty reduction gains. Soaring prices of essential goods have particularly hurt the middle and lower classes, fueling protests and calls for reform. The latest social realities in Morocco reflect major social problems, as rising costs of living are affecting even the middle class and social inequalities are worsening.

The Higher Commission for Planning (HCP) highlights education disparities as a major contributor to inequality, with 80% of families reporting worsening economic conditions in 2024. Limited access to quality education, particularly in rural areas, continues to hinder social mobility and exacerbate economic inequalities.

Morocco's Gender Inequality Index (GII) was 0.440 in 2022, reflecting ongoing gender disparities. The 2024 Arab Barometer report shows declining support for women's rights, with 57% of Moroccans believing men are better suited for political

Question
Score

Socioeconomic
barriers



leadership – a 22-percentage point increase since 2018. Morocco ranks 137th out of 146 countries in the Global Gender Gap Report, with women’s labor force participation still below 50% and significant wage gaps persisting.

Recent reports confirm that poverty and inequality are worsening due to economic instability, gender disparities and weaknesses in education and health care. Addressing these challenges requires urgent government action to expand access to services, invest in rural infrastructure, strengthen worker protections and ensure gender equality. As inflation and unemployment continue to rise, even the middle class is struggling, highlighting the need for comprehensive reforms.

Economic indicators		2021	2022	2023	2024
GDP	\$ M	142022.1	130951.9	144417.1	154431.0
GDP growth	%	8.2	1.5	3.4	3.2
Inflation (CPI)	%	1.4	6.7	6.1	1.0
Unemployment	%	10.6	9.5	9.0	8.9
Foreign direct investment	% of GDP	1.6	1.8	0.7	1.1
Export growth	%	7.9	20.5	8.8	8.6
Import growth	%	10.4	9.5	7.4	13.0
Current account balance	\$ M	-3348.7	-4800.3	-1530.0	-1868.8
Public debt	% of GDP	69.4	71.4	68.7	67.7
External debt	\$ M	65687.4	64971.8	69267.3	-
Total debt service	\$ M	6628.3	6017.2	5790.2	-
Net lending/borrowing	% of GDP	-6.0	-5.2	-4.4	-
Tax revenue	% of GDP	19.7	22.1	21.0	-
Government consumption	% of GDP	19.0	19.1	18.1	18.0
Public education spending	% of GDP	5.6	5.9	6.0	-
Public health spending	% of GDP	2.3	2.3	-	-
R&D expenditure	% of GDP	-	-	-	-
Military expenditure	% of GDP	3.8	3.8	3.6	-

Sources (as of December 2025): The World Bank, World Development Indicators | International Monetary Fund (IMF), World Economic Outlook | Stockholm International Peace Research Institute (SIPRI), Military Expenditure Database.

7 | Organization of the Market and Competition

Market-based principles are overseen and regulated by the Moroccan Competition Council, the Competition Law of 2014 and the Law on the Control of Concentrations. The government has also introduced initiatives such as the Moroccan Code of Good Corporate Governance to regulate state-owned enterprises (SOEs) and curb monopolies.

However, significant obstacles persist. Monopolistic practices remain common, with caps on foreign investment in key sectors and state control over industries such as phosphate extraction, hydrocarbons and transport. SOEs dominate infrastructure and benefit from state support, while the government limits foreign ownership in agriculture and major banks. Protectionist policies favor local businesses, with customs duties, local content requirements and a 15% premium on foreign bids in public tenders.

Political power and business interests are deeply intertwined. The king is a major economic actor with extensive holdings in key industries, while the head of government is among Morocco's top businessmen. This overlap fosters widespread conflicts of interest, allowing privileged companies to secure resources, contracts and regulatory advantages.

The International Finance Corporation (IFC) notes Morocco has weaker market competition compared to its regional peers. The informal economy accounts for 31.8% of GDP, with two-thirds of employment considered informal. While prices are largely market-driven, the government intervenes in sectors such as energy, agriculture and public utilities through subsidies and price controls.

Morocco's Competition Law No. 06-99, enforced by the independent Competition Council, aims to prevent anti-competitive practices. In 2023/24, the council fined fuel companies \$180 million, Maroc Telecom \$630 million and Viatris \$760,000. However, enforcement remains unclear – there is no confirmation of payments, and Maroc Telecom's fine exceeds its 2023 annual profit.

Meanwhile, state-owned enterprises (SOEs) maintain monopolies in key sectors like phosphates, telecoms and energy without penalties. Transparency Maroc highlights conflicts of interest – notably, Prime Minister Aziz Akhannouch's fuel company and the royal palace's telecom holdings.

The Competition Council has fined firms in direct competition with businesses linked to these figures, raising concerns about selective enforcement. If competition law is used to weaken rivals while protecting politically connected firms, it becomes a tool for control rather than market fairness. Transparency Maroc also highlights weak oversight, allowing monopolistic practices to persist.

Market
organization

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Competition policy

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Morocco has taken major steps to attract investment, launching the Mohammed VI Fund in 2020 and adopting the Investment Charter in 2022 to streamline processes and reduce bureaucracy. In January 2024, FDI rose 25% after a sharp drop in 2023, driven by renewable energy and infrastructure projects. Between May 2023 and June 2024, the National Investment Commission approved more than 100 projects worth MAD 173 billion (\$17 billion), creating 96,000 planned jobs. However, only 31% of financial targets and 19% of job goals for the period from 2022 to 2026 have been met, with persistent issues like bureaucracy, corruption and weak investment screening.

Morocco is strengthening trade ties globally. In July 2024, it finalized a Comprehensive Economic Partnership Agreement (CEPA) with the UAE, boosting trade and investment in key sectors. Russia is also expanding its presence, planning a free trade zone with Morocco, Egypt, Tunisia and Algeria after forgiving \$23 billion in African debt. Meanwhile, China sees Morocco as a trade gateway and, in 2024, committed over \$4 billion to EV battery factories, including Gotion High-Tech's \$1.3 billion gigafactory set for 2026.

Morocco is now North Africa's top automotive exporter, with vehicle exports to the European Union reaching €15.1 billion (\$16.4 billion) in 2023, a 30% increase. The country surpassed China and Japan as the top non-EU supplier, exporting 536,000 vehicles. Automotive components such as wiring harnesses (\$4.7 billion) and powertrains (\$1.1 billion) further drive growth.

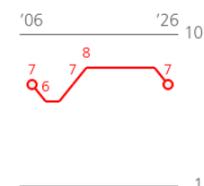
With 80% of its 700,000 vehicles exported to Europe, Morocco aims to reach 1 million by 2025. Tanger Med, its main export hub, handled 578,500 vehicles in 2023, a 21% increase. The \$1.2 billion Dakhla Atlantic Port in Western Sahara further strengthens Morocco's regional trade influence.

Morocco has a well-developed banking sector and a functioning capital market that adhere to international standards. The country is home to some of the largest banks in Africa, which have expanded their business beyond national borders by operating overseas subsidiaries and acquiring local banks. There are 24 banks operating in Morocco, including five "participatory" banks and 11 microcredit associations. Attijariwafa, 47% owned by Al Mada, the Moroccan royal family's holding company, is the largest bank in Morocco and operates in 25 countries. Moroccan banks comply with international standards set by the Basel Accords. The 2024 IMF report noted that Moroccan banks have healthy non-performing loan (NPL) provisions, which remained stable at approximately 8.3% from 2020 to 2022. Outstanding banking credits rose 4.1% year-on-year in 2024, with a rise of 7.9% in equipment loans, 6.4% in real estate development loans, and a 1.3% decrease in cash facilities, as reported by Morocco's central bank, Bank Al-Maghrib (BAM).

Bank al-Maghrib (BAM), Morocco's central bank, oversees monetary policy, regulates the banking sector, enforces compliance with international financial reporting standards (IFRS) and ensures financial stability. It also manages foreign exchange reserves and supervises payment systems.

Liberalization of foreign trade

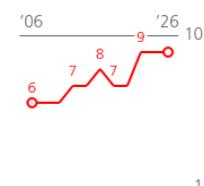
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Banking system

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The Moroccan Stock Exchange Law regulates the Casablanca Stock Exchange to ensure transparency in financial reporting and accounting. To support capital market growth, the government passed the Crowdfunding Law (15-18) in February 2020, allowing individuals and businesses to raise funds through donations, loans or equity investments via digital platforms. The law distinguishes between three types of crowdfunding – loans, equity investments and donations – while regulatory oversight is divided between Bank Al-Maghrib and the Moroccan Capital Market Authority (AMMC). Additionally, participatory banks provide more financing options for businesses. Moroccan capital markets have maintained low non-performing loans, reaching about 8.3% in 2022, indicating moderate risk.

8 | Monetary and fiscal stability

In 2023, inflation rose to 6.1%, driven by drought-related agricultural price hikes, rising energy costs and global supply chain disruptions. Inflation volatility remains a key concern. Bank al-Maghrib (BAM) responded by raising interest rates to stabilize prices.

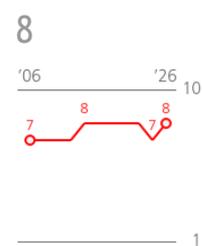
Morocco operates a managed exchange rate system, pegging the dirham to a basket of 60% euro and 40% U.S. dollar. To enhance flexibility, BAM has gradually widened the dirham's fluctuation band from $\pm 0.3\%$ to $\pm 5\%$ since 2018. In 2023, the Real Effective Exchange Rate (REER) Index reached 99.4, reflecting stable external competitiveness. BAM has maintained foreign exchange stability by preventing speculative attacks.

Law No. 76-03 grants BAM autonomy in setting monetary policy, including interest rates and inflation management, while prohibiting government borrowing except in emergencies. The bank maintains transparency through press conferences and reports. Despite government pressure in 2023/24 to lower interest rates, BAM upheld its commitment to long-term stability over short-term growth.

The Moroccan government's fiscal policies have produced mixed outcomes in recent years, reflecting both challenges and achievements in fiscal stability. According to the 2023 Finance Law, Treasury borrowing was projected to increase to nearly MAD 130 billion (\$14.2 billion) in 2023, up from MAD 105.38 billion (\$11.5 billion) in 2022. This includes more than MAD 69 billion (\$7.6 billion) from domestic borrowing and MAD 60 billion from external sources.

As a result, the Treasury's debt-to-GDP ratio was expected to rise to 70.8% in 2023, with 54.6% from domestic debt and 16.3% from external debt. Taking into account the expected decline in state-guaranteed external debt to 12.4% of GDP in 2023 (down from 12.9% in 2022), the overall public debt rate was projected to reach 83.2% of GDP in 2023, compared to 82.5% in 2022.

Monetary stability



Fiscal stability



Despite these debt dynamics, Morocco has made notable progress in reducing its trade deficit. This improvement is driven by increased exports, strong remittances from the Moroccan diaspora, robust performances in phosphate, textile and agricultural exports (despite drought conditions), a recovery in tourism and the stabilization of energy prices. These factors have strengthened the country's balance of payments and enhanced economic resilience.

9 | Private Property

Land ownership in Morocco is managed by the National Agency for Real Estate Conservation (ANCFCC) in urban areas, while many people in rural areas rely on customary “milkiya” documents as proof of ownership. Foreigners may own land except for agricultural land, which they can only lease for up to 99 years. Since 2021, foreign joint ventures have been permitted to invest in rural land.

More than a third of Morocco's land is classified as “collective land,” governed by a 1919 royal decree. Though tribes use it, ownership remains with the Ministry of the Interior. Before 2019, the state could transfer this land for public projects, often at the expense of local communities. The La Plage des Nations project by Addoha illustrates this, as tribal land was expropriated and sold for luxury development without fair compensation.

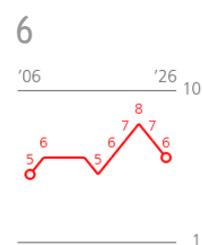
Other key land categories include awqaf land, controlled by the Ministry of Islamic Affairs, and palace-owned land, which operates outside typical regulations. Additionally, Morocco's public beaches are increasingly being privatized despite the 2015 coastal protection law. Enforcement remains weak due to lobbying pressure, with temporary permits often abused to turn public beaches into private resorts and commercial spaces.

While Morocco has legal frameworks protecting property rights, enforcement remains inconsistent and certain groups – particularly women, rural communities and marginalized populations – struggle to secure their rights. Weak enforcement allows for land expropriation, inadequate compensation and the privatization of public land, often benefiting political and economic elites.

Gender inequality in land ownership remains a challenge. Women have historically been excluded from inheriting collective land due to customary practices. A 2019 reform, supported by the Millennium Challenge Corporation, aligned inheritance rules with Morocco's Family Code, granting women legal recognition as heirs. Awareness campaigns, legal aid and financial literacy programs have since helped increase female land ownership, with women now holding 34% of titles in a recent privatization pilot.

While progress has been made in securing property rights and expanding women's access to land, ongoing challenges related to enforcement, corruption and elite influence continue to undermine equitable property ownership in Morocco.

Property rights



The Moroccan government continues its privatization program, transferring assets such as Maroc Telecom, La Mamounia and several agricultural sector companies to private ownership. In July 2023, the management of drinking water, electricity and sanitation was also handed over to private companies. However, the state maintains significant control over key sectors, including banking, transportation, energy and mining.

While the legal framework protects private enterprises, their contribution to economic growth remains limited. The private sector struggles to expand: 84.4% of businesses generate less than MAD 1 million in revenue and employ fewer than 10 people. The business failure rate is high, and in 2023, 200,000 jobs were lost in rural areas (World Bank). Between 2016 and 2019, the private sector's contribution to labor productivity grew by only 2.2%, and large firms tend to be less productive than medium-sized ones.

The dominance of the Makhzen and royal holdings such as Al Mada severely restricts fair competition. These entities benefit from privileged access to financing and resources, creating an unlevel playing field for businesses. Corruption further exacerbates these inequalities. According to Transparency Maroc, Morocco fell to 99th place out of 180 countries in the 2024 Corruption Perceptions Index (CPI), scoring 37/100, down from 41/100 in 2019. The organization describes corruption in Morocco as “endemic and systemic” – citing a lack of political will to implement reforms.

Transparency Maroc also suspended its participation in the National Anti-Corruption Commission (CNAC) in January 2025, citing the government's failure to show genuine commitment to fighting corruption.

Without structural reforms and increased transparency, the private sector will continue to face significant obstacles that constrain Morocco's economic potential.

10 | Welfare Regime

Morocco provides various forms of aid to vulnerable populations, including cash transfers, subsidies and food assistance. The Tayssir program supports low-income families on the condition that children attend school. The government also subsidizes basic goods like flour, sugar and butane gas, though recent reforms aim to shift toward targeted cash transfers. During crises and Ramadan, additional food aid is distributed. The National Initiative for Human Development (INDH) funds small community projects to alleviate poverty.

The social protection system covers public and private sector employees. National Fund for Social Security Organizations (CNOPS) manages public sector benefits, while National Social Security Fund (CNSS) handles private sector coverage,

Private enterprise

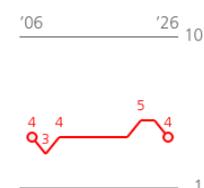
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Social safety nets

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including non-salaried workers. Programs like RAMED (now AMO TADAMON) aim for universal health coverage (UHC). As of 2022, 79.8% of Moroccans were covered, but by 2024 one-third of the workforce still lacked social protection. Expanding AMO now includes self-employed professionals, students and voluntary contributors.

However, public health care remains underfunded and overstretched. Health expenditure fell from 2.3% of GDP in 2011 to 2.2% in 2021, with shortages of staff and equipment. UNICEF and the African Development Bank highlight inefficiencies, with many rural, informal and migrant workers excluded from welfare programs.

Workers in outsourcing – especially in foreign-owned call centers, logistics and industrial subcontracting – face extreme precarity. Many endure low wages, unstable contracts and a lack of social security benefits. The dominance of foreign firms weakens collective bargaining, leading to widespread job insecurity and exclusion from pension and health coverage.

Morocco’s pension system remains inadequate, covering only 40% of the workforce. Women receive lower pensions and private sector retirees struggle with insufficient benefits.

In the absence of a strong welfare system, families and communities fill the gaps, but increasing reliance on precarious outsourced labor exacerbates social vulnerabilities and leaves many without a reliable safety net.

In Morocco, inequalities persist due to gender, social background and citizenship status. While enrollment rates in education are high, with equal access for boys and girls in primary and secondary education (GPI of 1.0) and a slight advantage for women in tertiary education (GPI of 1.1), significant literacy gaps remain. In 2022, 85.6% of men were literate, compared to 69.1% of women, highlighting ongoing challenges.

Although enrollment rates are high (114.5% in primary, 89.8% in secondary and 47.7% in tertiary education), fewer women transition to higher education. In the workforce, female participation fell from 25.7% in 2013 to 22.5% in 2023, with women facing cultural barriers and workplace discrimination. Many are limited to informal or unpaid work.

Youth unemployment is a significant issue, with 36.1% of young people and 19.4% of graduates unemployed in 2024 (HCP). The education system’s mismatch with labor market demands exacerbates this, contributing to a shortage of skilled labor. In the second quarter of 2024, Morocco’s unemployment rate rose to 13.1%, with notable increases in urban and rural areas. Women, youth and graduates continue to be disproportionately affected, underscoring deep structural challenges in the labor market.

Equal opportunity

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Immigrants and refugees face low wages, unsafe conditions and limited access to social services. “Irregular” migrants in particular are highly vulnerable due to restrictive housing laws.

The HCP also reports that nearly 60% of Morocco’s national wealth is concentrated in three regions: Casablanca-Settat (31.4%), Rabat-Salé-Kénitra (16.1%) and Tangier-Tetouan-Al Hoceima (10.4%). This concentration highlights the economic disparity between regions, with less-developed areas like Drâa-Tafilalet contributing far less to the national GDP.

11 | Economic Performance

Morocco’s economic indicators show mixed results. In 2023, GDP per capita (PPP) reached \$9,743, growing by 2.1%. Unemployment stood at 9.1%, but by 2024 it rose to 13%, with a loss of 297,000 jobs by October 2023. Youth unemployment reached 35.8% and women’s labor force participation was just 19%, marking the worst unemployment figures in the country’s history.

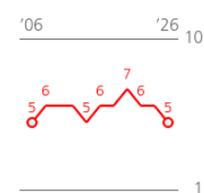
Inflation in 2023 was 6.1%, significantly affecting food prices. According to the 2024 Arab Barometer, 63% of Moroccans now experience food insecurity, a sharp rise from 36% in 2022. Economic inequalities are stark, with 39% of Moroccans saying the wealth gap has widened.

Foreign direct investment (FDI) was low in 2023 at 0.8% of GDP, hindered by bureaucratic hurdles and political uncertainty. Gross capital formation was 28%, with major investments in infrastructure and energy. The current account balance was at -\$891.2 million, reflecting a trade deficit.

The economy remains vulnerable, especially in the agriculture sector, which is prone to climate volatility. High unemployment rates and the informal economy continue to challenge stability.

Output strength

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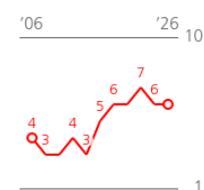


12 | Sustainability

Morocco has made efforts to integrate environmental concerns into policies through initiatives such as the National Strategy for Sustainable Development (NSSD) and the Green Morocco Plan (Plan Maroc Vert). Key laws address air pollution (Law 13-03), water management (Law 36-15) and biodiversity protection (Law 29-05). The country aims to generate 52% of its electricity from renewable sources by 2030, including solar, wind and hydropower. The Noor Solar Complex and Tarfaya Wind Farm showcase Morocco’s commitment to clean energy. Additionally, the government incentivizes sustainable practices through tax exemptions, subsidies for eco-friendly irrigation and investments in urban transport.

Environmental policy

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Despite these efforts, challenges persist. Small-scale farmers and rural communities lack resources for green technology, and enforcement of environmental laws is inconsistent. Morocco's economic and poverty goals often conflict with environmental goals, particularly in areas with stark disparities. The Green Morocco Plan has been criticized for exacerbating the water crisis by overexploiting fragile groundwater in water-scarce regions.

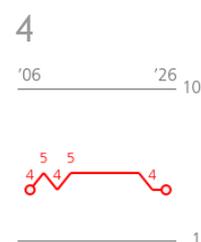
Moreover, environmental laws in Morocco are often not effectively enforced. For example, the plastic bag ban, introduced during an international conference in Marrakech, was largely ignored after the event, with plastic bags quickly reappearing. Pesticide use in agriculture and opaque fishing practices also persist – revealing a gap between environmental laws and their real-world implementation.

Morocco has implemented significant reforms to modernize its education system, but challenges persist. The literacy rate in 2022 was 77.3%, with room for improvement, especially among women and in rural areas. The U.N. Education Index rose to 0.609 in 2022 from 0.479 in 2012. Enrollment rates are high at the primary and secondary levels, but dropout rates, particularly at the secondary level, remain a concern. Tertiary education has expanded, though many parents criticize the quality and are opting for loans to send children abroad or to private universities. In January 2025, Morocco ranked 78th out of 81 countries in the Global Future Skills Index, showing a mismatch between graduates' skills and market needs. Over half (55%) of Moroccans aged 18-29 express a desire to emigrate due to limited opportunities (Arab Barometer 2024).

Regional disparities and a shortage of qualified educators hinder reforms. More than half of school principals report teacher shortages, with 44.3% of teachers unqualified. Furthermore, 77.6% of schools lack adequate digital resources. According to PIRLS data, 59% of Moroccan students fall below the minimum reading proficiency level and 64.9% of children under 10 cannot read a simple text (World Bank, 2022). Moroccan students rank poorly in math, reading and science, with performance significantly below the OECD average.

The university sector faces structural issues, lack of competence and political challenges. In 2023, Morocco allocated 6.0% of its GDP to education, but R&D spending remains low compared to OECD and EU averages. Enrollment rates in 2021 were 111.8% at the primary level, 82.2% at the secondary level and 42.8% at the tertiary level.

Education policy /
R&D



Governance

I. Level of Difficulty

Morocco faces several structural challenges that constrain its governance performance. A pronounced urban–rural divide significantly affects poverty; rural regions, especially those with substantial Amazigh populations, are economically isolated due to inadequate road networks, limited markets and insufficient financial resources. Agriculture, the main economic activity, is highly vulnerable to droughts. Limited access to education and jobs further restricts opportunities to improve livelihoods outside urban centers.

The country faces growing water scarcity and desertification, which threaten its agriculture-dependent economy and lead to periodic economic shocks. Natural disasters further exacerbate vulnerabilities. The 2023 earthquake caused widespread destruction and loss of life, exposing the lack of earthquake-resistant infrastructure in rural areas and mismanagement of reconstruction funds.

In addition to these internal challenges, Morocco faces external constraints, particularly its long-standing territorial dispute with Algeria over Western Sahara and Algeria’s support for the Polisario Front. This conflict limits Morocco’s diplomatic efforts and regional cooperation.

Morocco has a vibrant civil society with more than 240,000 registered associations focused on issues such as social justice, education and women’s rights. The 2011 constitution granted CSOs the right to petition and participate in governance. However, these organizations face significant constraints, including bureaucratic hurdles and strict regulations that limit their autonomy. Many are forced to avoid political issues to secure funding and avoid repression.

Recently, Fouad Abdelmoumni, a prominent activist, was arrested in October 2024 for criticizing the state’s use of Pegasus spyware. His case highlights rising tension between civil society and the state, raising concerns over freedom of expression and the shrinking space for independent activism.

Social trust in Morocco is complicated by these dynamics. While civil society remains active, state control over initiatives erodes public confidence and limits meaningful reform. Movements such as the February 20 and Rif Hirak movements continue to advocate for political and social change, emphasizing issues like social injustice, corruption and government repression.

Structural constraints

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Civil society traditions

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Political, social, ethnic and religious conflicts in Morocco are largely contained by the monarchy's ability to act as a unifying force, leveraging both its symbolic and political power to maintain stability. However, politics remain highly confrontational. The monarchy has centralized power and people often take to the streets to demand political reforms and social justice. Civil movements continue to mobilize large groups who feel the current system fails to meet their needs. These movements often bypass political parties, viewing them as co-opted and corrupt. Protests are frequently met with violence.

Uneven economic growth, corruption and clientelism fuel social unrest. Marginalized groups, particularly in the Rif and Atlas Mountains, face underdevelopment, unemployment and poverty. Among youth, a widespread sense of exclusion and "hogra" (humiliation) feeds frustration and fuels recurring protests.

A significant movement has also emerged among university students, particularly those studying medicine. These students have protested poor working conditions, overcrowded classrooms, limited resources and inadequate health care infrastructure. Their demands for better training conditions, higher salaries and reforms in the medical education system reflect broader frustrations with public sector limitations and youth disenfranchisement.

While Morocco has made strides in recognizing Amazigh culture, Amazigh populations still endure economic and political marginalization. Western Sahara also experiences periodic social unrest and pro-independence protests, driven by economic marginalization and human rights violations.

Morocco is often cited as a model of religious tolerance in the region. Government initiatives seek to promote moderation, coexistence and religious tolerance through educational programs and public dialogue. The Terrorism Index in Morocco dropped to 0 points in 2023. Nonetheless, authorities arrested at least 56 individuals that year linked to or inspired by IS.

Conflict intensity

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II. Governance Performance

14 | Steering Capability

The Moroccan government demonstrates a moderate capacity to set and maintain strategic priorities. The executive branch develops policies on economic growth, social development, infrastructure, education and health care. Strategic planning units have been established to gather data, conduct research and inform policy decisions. However, maintaining a unified strategic direction remains a challenge. The monarchy retains ultimate authority, with the king having the final say in decision-making. The king's speeches set the government's agenda, and the Makhzen, under his leadership, drive and shape long-term priorities, often serving particularistic goals

Question
Score

Prioritization

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through formal and informal mechanisms. High-level decisions and key policies are crafted by the king and his royal advisers, while initiatives that conflict with their broader interests are frequently abandoned. The elite surrounding the monarchy also work to ensure that policies protect their economic interests, often at the expense of broader reforms. This dynamic of competing interests slows progress and undermines long-term strategic planning.

The Moroccan government struggles to implement policies effectively. While strategic priorities are set, execution often falls short due to bureaucratic inefficiencies, lack of coordination and insufficient resources.

For example, the Green Morocco Plan, which aimed to promote sustainable agriculture, has led to groundwater depletion in water-scarce regions, yet no corrective actions have been taken. Similarly, the plastic bag ban enacted in 2016 was quickly ignored and plastic bags remain widespread due to poor enforcement.

Education reforms have also been ineffective, with overcrowded classrooms, unqualified teachers and a mismatch between educational outcomes and labor market needs, contributing to high youth unemployment. The health care reform, which aims for universal coverage, remains underfunded, and rural areas still face limited access to services.

The New Development Model (NDM) promotes economic diversification, but progress is slow due to centralized control and weak local implementation. Corruption and clientelism continue to divert resources, further delaying development initiatives and perpetuating inequalities.

The government demonstrates limited innovation and flexibility in policymaking, with occasional instances of learning from past experiences. One example is adjustments made to the National Initiative for Human Development (INDH). Initially, the INDH faced challenges such as poor targeting of beneficiaries and inefficient resource allocation. To address these issues, the government gathered feedback from local communities, NGOs and international partners. Based on this input, it introduced more precise targeting mechanisms and capacity-building programs, which improved outcomes in poverty alleviation, infrastructure development and economic opportunity creation.

Structural barriers, centralized decision-making and particularistic interests often overshadow policy learning. The lack of institutionalized mechanisms for continuous monitoring undermines Morocco's ability to integrate lessons from past experiences effectively. In education, for example, despite numerous reforms, persistent issues of quality and accessibility remain unaddressed. Lessons from previous initiatives are rarely incorporated into new reforms, which often prioritize short-term outcomes over long-term solutions.

Implementation

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Policy learning

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The Special Royal Commission was tasked with rethinking Morocco's economic model, resulting in the New Development Model (NDM) aimed at addressing deep-rooted challenges like poverty and regional disparities. While the NDM is a step toward inclusive growth, its implementation faces delays due to weak coordination and resistance from political and economic elites.

Many reforms fail because of inconsistent implementation, lack of follow-through and weak data collection. Poor coordination between ministries prevents the sharing of lessons learned. These challenges in education reflect broader failures to learn from past experiences, as policies often fail to address national challenges due to limited reliance on evidence-based decision-making.

Morocco participates in international cooperation, working with organizations such as the World Bank, WHO and FAO, and takes part in international climate initiatives. However, international knowledge is not consistently translated into broad national policies and is sometimes selectively applied. The government also consults academic experts, consultants and research institutions, such as the Royal Institute for Strategic Studies (IRES), for policy recommendations. Many of these experts, however, align closely with regime narratives, limiting the potential for diverse or innovative perspectives.

15 | Resource Efficiency

Morocco's public administration faces challenges with inefficiency and bureaucratic delays. While there are efforts to professionalize public administration and recruitment processes, political interference in appointments and dismissals remains a concern. Recruitment for lower and mid-level civil service adheres to competitive procedures, but higher-level senior positions are sometimes filled based on political loyalty or patronage networks.

Morocco struggles to achieve a fully balanced budget. Gare de Rabat-ville is a notable example of budget waste, mismanagement and misallocation of public funds. The renovation project, paralyzed for nearly two years without clear justification, has been reactivated with a new architectural concept. As of January 2025, previous plans have been scrapped, resulting in substantial budgetary losses and raising serious concerns about transparency and accountability. A significant portion of public funds has effectively been wasted. The Court of Auditors, which oversees government finances, continues to issue critical reports, but its recommendations are frequently ignored.

The new Rabat theater, which has required a substantial public investment for its construction, offers another example of inefficiency. Despite this significant financial commitment, the theater remains closed, primarily because there is no clear programming or planned use for the venue. This underscores the disconnect between ambitious infrastructure projects and the failure to ensure their operational success – raising concerns about the effective use of public resources.

Efficient use of assets

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Morocco has introduced measures to enable efficient administrative organization, including e-government initiatives to streamline procedures. However, outdated bureaucratic structures, slow decision-making and resistance to change hinder progress. Decentralization efforts have been limited in practice, with decision-making and budget allocation remaining centralized, giving local governments limited financial autonomy. Overall, reforms have been slow to implement and not always fully effective.

In Morocco, the government has made some progress in coordinating policies, but challenges persist due to competing interests. Balancing economic growth, social welfare and environmental sustainability remains difficult, with rapid industrialization often clashing with sustainability goals.

The Green Morocco Plan has had significant negative social effects. The focus on water-intensive agriculture has led to water overuse, soil degradation and deforestation, contributing to a water crisis. A recent example is the sheep shortage before Eid – forcing the king to ask Moroccans to forgo traditional sheep sacrifices. This shortage, caused by the Green Morocco Plan’s agricultural practices, led to Morocco having to import meat. While elites in agribusiness benefit from these policies, rural and marginalized communities suffer the environmental consequences. The Vision 2030 tourism initiative has further strained natural resources and led to displacement and gentrification in popular areas, worsening inequality.

Coordination among ministries remains a challenge, with turf wars delaying progress. The Ministry of Investment and other specialized bodies attempt to improve coordination, but disputes between ministries – such as between the Ministry of Agriculture and the Ministry of Water Resources – often stall reforms.

Morocco’s political system relies on top-down decisions and patronage networks, which can lead to inconsistent policy implementation. Meanwhile, the king’s prolonged absence due to ongoing health issues has fueled uncertainty about governance and decision-making at the highest levels. This situation has led to growing speculation over power dynamics within the monarchy and its ability to manage pressing political and territorial challenges.

Morocco has established institutional frameworks and anti-corruption policies, but their effectiveness is often undermined by weak enforcement, political interference and inconsistent implementation.

The Court of Auditors (Cour des Comptes) audits government finances and offers transparency recommendations, but political interference hinders their execution. While laws exist on party financing, few mechanisms ensure transparency, allowing corruption to thrive.

The Right to Information Law (31.13), which aims to improve access to public data, faces uneven implementation, with institutions still denying access and delaying responses.

Policy coordination

4

'06 _____ '26 10



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Anti-corruption policy

3

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Officials are required to declare assets, but enforcement remains weak, with reports of discrepancies in declarations. The Public Procurement Code and National Agency for Public Procurement (ANP) were introduced to ensure transparency, yet favoritism persists as seen with Akwa Group, led by Prime Minister Aziz Akhannouch.

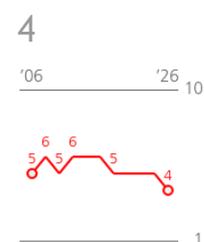
The 2023 annual report from the National Authority for Probity, Prevention and Fight Against Corruption (INPPLC) revealed widespread corruption, with bribery and election fraud remaining common. The national anti-corruption strategy has struggled due to poor coordination and lack of commitment.

16 | Consensus-Building

While there is nominal consensus on democracy and the market economy, both are largely rhetorical constructs promoted by the monarchy rather than genuine policy commitments. The political system remains largely authoritarian, with the monarchy's promotion of democracy being mostly symbolic. This narrative of reform has helped consolidate royal authority rather than disperse it. The political and economic elites overwhelmingly support the status quo, stifling the development of a fully functioning democratic system. While Morocco's political landscape includes political parties, interest groups and economic elites, the monarchy and its inner circle remain the dominant actors, shaping both domestic and foreign policies. Administrative parties, such as the National Rally of Independents (RNI) and the Authenticity and Modernity Party (PAM) – currently the key players – demonstrate a shallow commitment to democracy. These parties do not press for democratic reforms as they benefit significantly from their loyalty to the monarchy. The Justice and Development Party (PJD), once a strong opposition force, chose to accommodate the monarchy rather than advocate for meaningful democratic change. Meanwhile, fragmented leftist parties lack the organizational strength and political influence to push for substantive reforms. Major interest groups and the economic elite align closely with royal priorities, as their economic survival depends on the Makhzen's control over key sectors of the economy. Groups that challenge the status quo face repression or co-optation and are generally excluded from meaningful participation in political and economic processes. Both political and economic elites resist democratic reforms that could limit the king's power, fearing they would lose their privileges and influence.

While Morocco supports the idea of a market economy, it does not fully function as one. Liberalization measures introduced in the 1980s led to the establishment of crony capitalism. The economic system is largely controlled by the Makhzen and a small network of politically connected elites with close ties to the monarchy. Although market reforms were initiated, they have primarily benefited the king and his inner circle rather than fostering inclusive, broad-based growth. Morocco's so-called market economy functions more as a façade. Although there appears to be

Consensus on goals



liberalization, the economic system is tightly controlled by the monarchy and a select group of elites who maintain monopolistic practices and preferential treatment. These mechanisms enable the elite to retain economic dominance and ensure that resources are funneled toward their interests, while broader segments of society remain excluded from real economic opportunities. In practice, the market economy serves to preserve the status quo, maintaining elite power and privilege rather than promoting a genuinely competitive or inclusive economic environment.

Anti-democratic actors in Morocco – namely the monarchy, the military, the Makhzen and many political parties – significantly constrain reformers' ability to enact change. These actors, including political parties, have successfully marginalized democratic forces and sidelined them from meaningful participation in the political process. They hold critical sources of power, making reform efforts exceedingly difficult. The monarchy refuses to relinquish its political and economic prerogatives, and any significant attempt to limit the king's powers has faced strong resistance, including from the political elite. While the military is not overtly involved in day-to-day governance, it remains loyal to the monarchy and committed to preserving the status quo. Its entrenched power is used to suppress demands for democratization and prevent institutional change.

Many political parties, though ostensibly part of the democratic process, also act as anti-democratic forces by aligning themselves with the monarchy and existing power structures. These parties often prioritize maintaining their political positions and patronage networks rather than pushing for genuine democratic reforms that could challenge the entrenched power of the monarchy. They rarely offer alternatives that could break the cycle of political and economic domination. Similarly, influential economic actors who benefit from their loyalty and proximity to the monarchy have little incentive to support reforms that could disrupt their privileged status.

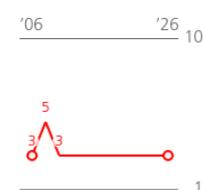
To counter these anti-democratic veto actors, reformers must build broad societal consensus on the necessity of genuine democratic reforms to ensure inclusive growth. Cross-class and cross-sector coalitions should be formed, mobilizing public support to challenge the status quo. There is also a need to cultivate an alternative economic elite that recognizes democratization as an opportunity to foster a competitive economy that benefits all segments of society.

In Morocco, social, regional and class divisions are managed by the monarchy through co-optation, patronage and symbolic gestures. The monarchy's strategy of central control may contain tensions in the short term but fails to address the underlying economic, political and social grievances of marginalized groups.

Efforts to narrow the urban–rural divide through regional development and infrastructure investment have done little to ease discontent. In the Rif region, protests over economic underdevelopment, poor infrastructure and mismanagement of resources continue. Recent droughts in 2023 and 2024 exacerbated these frustrations, especially in rural and northern areas, where government mismanagement of water resources spurred protests.

Anti-democratic actors

3



Cleavage / conflict management

5



On the Amazigh issue, the 2011 constitution recognized the Amazigh language as official, but many Amazigh communities still feel their culture, language and political rights are under-represented. Despite some symbolic measures like introducing the Amazigh language in education and media, there remains slow development in Amazigh regions, which suffer from poverty and poor infrastructure. Protests are common, with activists often facing imprisonment for raising these grievances.

The growing gap between the wealthy elite and the underprivileged is a key grievance. Crony capitalism benefits a narrow elite tied to the monarchy, producing uneven growth. Poverty alleviation measures have been largely symbolic, designed more to preserve the status quo than to challenge the entrenched interests of the Makhzen.

The monarchy has also exploited political divisions between Islamist and leftist factions to weaken both sides and maintain dominance. By co-opting and delegitimizing these groups, it ensures that no organized political alternative can emerge to contest royal authority.

While Morocco has institutional mechanisms for engaging civil society actors in policymaking, their ability to shape policy remains constrained. CSOs often participate in state-initiated consultations or national commissions, such as during the 2011 constitutional reforms and the New Development Plan. They raise issues through lobbying, advocacy, protests or media campaigns, but their influence tends to be reactive rather than proactive. Agenda-setting remains largely top-down and dominated by the monarchy.

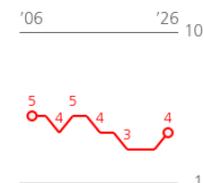
Organizations like ADFM, Fédération des Ligues des Droits des Femmes and Jossour Forum des Femmes Marocaines have long advocated for a revision of the Family Code. However, it was only in 2023, during the king's Throne Day speech, that a call for reform was made. At that point, these CSOs were consulted and asked to present recommendations.

The Economic, Social and Environmental Council (CESE) includes civil society representatives to provide recommendations during policy formulation. However, this role is largely symbolic, as the monarchy retains control over key decisions and recommendations are often disregarded. Policies continue to be shaped at the highest levels of power.

In general, civil society actors are more involved at the local level and in areas such as social welfare. Organizations such as the Moroccan General Union of Workers (UGTM) and the Moroccan Labor Union (UMT) are regularly consulted in policymaking, as are CSOs focused on gender equality or sustainable development. However, their participation is largely excluded from discussions on political reforms or economic policies.

Public
consultation

4



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When it comes to policy implementation, civil society is more active at the local level, often partnering with the government to execute programs. Some organizations, such as the Moroccan Association for Human Rights (AMDH), monitor policy implementation and offer recommendations. However, these recommendations often go unheeded, as the government remains largely intolerant of criticism.

The Equity and Reconciliation Commission (IER), established in 2004, investigated human rights abuses during Morocco's "Years of Lead" (1960s – 1990s) under King Hassan II's regime. It focused on forced disappearances, torture and extrajudicial killings, offering reparations and moral justice through public hearings. However, the IER's recommendations largely remained unimplemented. Despite its call for systemic reforms, legal accountability and stronger human rights protections, many of its proposals were ignored or sidelined. The commission's approach emphasized restorative rather than retributive justice, and it granted amnesty to perpetrators, leaving many unpunished. The lack of political will to hold the state and monarchy accountable rendered the process largely symbolic, with no real change in addressing past abuses or preventing future ones.

Reconciliation

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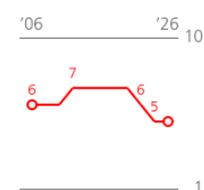


17 | International Cooperation

Morocco has developed several strategic initiatives, including the development plan (2020 – 2030), the National Sustainable Development Strategy and Vision 2030 for tourism. These plans aim to diversify the economy, promote inclusive growth, create jobs and reduce regional disparities. To achieve these goals, Morocco seeks international support from Western and Gulf countries as well as organizations like the World Bank, the European Union, the United Nations and the African Development Bank, which provide technical assistance, foreign direct investment and expertise.

Effective use of support

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However, the effectiveness of this international cooperation is hindered by short-term political agendas, bureaucratic challenges and corruption. These issues limit the impact of foreign aid and investments, preventing Morocco from fully meeting its development objectives. Large-scale projects like the TGV (high-speed rail) strain the national budget – leaving sectors like health and education underfunded.

Morocco is also preparing for major international events, including the 2025 Africa Cup of Nations and the 2030 FIFA World Cup, which align with the country's vision to boost infrastructure and global prestige. These events present an opportunity to showcase development and attract investment, but the heavy focus on sports infrastructure often competes with the country's more pressing domestic needs.

The urban development projects linked to these events have sparked social and political tensions. In Rabat, authorities have faced accusations of illegal demolitions and forced evictions, particularly in the L'Océan district, allegedly to make way for

a golf course. Such actions have fueled concerns about gentrification and the displacement of vulnerable residents, reinforcing the perception that the city is being reshaped for visitors and tourists rather than its own inhabitants.

Part of the Hassan II Agronomic and Veterinary Institute (IAV) campus is also under threat, with plans to build a new road connecting the Agdal-Riyad and Souissi districts in preparation for the 2030 World Cup. The project would demolish several student dormitories, drawing criticism from academics and students alike. These controversies underscore the growing tension between large-scale infrastructure projects and the rights of local communities, raising questions about the social costs of development and the exclusion of citizens from urban planning processes. Many Moroccans increasingly feel that their cities are being built not for them, but for outsiders.

Morocco has ratified various international agreements, but its compliance with and alignment to international norms remain inconsistent. Morocco has demonstrated commitment to economic development and environmental initiatives by ratifying climate change accords such as the Paris Climate Agreement and by promoting renewable energy and trade agreements. The country actively engages with the International Court of Justice (ICJ) and the World Trade Organization (WTO). This engagement has earned Morocco a positive reputation in sectors such as trade, security and regional cooperation.

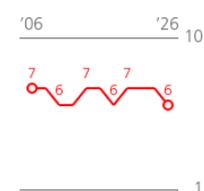
However, its human rights record tells a different story. Under both national and international pressure, Morocco ratified key human rights conventions, including International Labour Organization (ILO) core labor standards, and made legal reforms to protect a wide range of rights. Despite these steps, Morocco has faced criticism for failing to uphold fundamental human rights, especially freedom of speech, press, assembly and civil rights.

Morocco often rejects the views and recommendations of international NGOs, revealing a gap between its official stance and the practical implementation of these commitments. Additionally, the Western Sahara issue remains a major source of tension with the international community, especially with the United Nations and the European Union.

In general, Morocco's political leadership is willing to cooperate with its neighbors, particularly on economic and security matters. It actively engages with regional organizations such as the Arab Maghreb Union (UMA), the League of Arab States, the Organisation of Islamic Cooperation (OIC) and the African Union (AU), which it rejoined in 2017. Additionally, Morocco participates in the Union for the Mediterranean (UfM) and has applied to join the Economic Community of West African States (ECOWAS). These initiatives aim to foster regional stability and drive economic development.

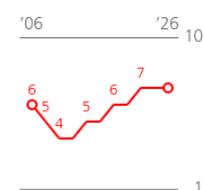
Credibility

6



Regional cooperation

7



However, political and territorial disputes, particularly with Algeria over Western Sahara, have limited the scope of this cooperation. The two countries have faced numerous diplomatic confrontations over the years, including the closure of their shared border in 1994, largely due to Algeria's backing of the Polisario Front. Morocco has made several attempts to mend relations, offering to reopen the border and proposing joint regional projects, but Algeria has shown resistance. In 2021, Algeria cut ties with Morocco. The two nations have so far avoided direct military conflict despite widespread misinformation in both countries and an escalating arms race.

Relations with the European Union (EU) have remained tense as well. On October 4, 2024, the European Court of Justice (ECJ) annulled EU-Morocco trade agreements on fisheries and agricultural products from Western Sahara, pushing the European Union in the opposite direction from countries such as France, Spain and the United States, which has either (silently) accepted or officially acknowledged Western Sahara as part of Morocco. European diplomats were keen to quickly emphasize the high importance of EU-Morocco relations, and Moroccan diplomats – in notable contrast to 2016, when the ECJ had already interfered for similar reasons – played down the ruling as not particularly relevant, as analyzed by Souhira Medine for the Washington Institute for Near East Policy

Strategic Outlook

Morocco faces significant challenges, including socioeconomic inequality, weak governance, environmental degradation and an underperforming education system. Addressing these interconnected issues requires a comprehensive approach that engages both domestic and international actors. To promote socioeconomic inclusion, Morocco must bridge the urban–rural divide by focusing on infrastructure development, education and job creation. Reducing poverty and inequality calls for upgrading health care facilities, expanding social protection programs, ensuring efficient service delivery, and tackling gender inequality and discrimination.

Youth unemployment is a critical issue that demands the creation of a more inclusive labor market by supporting small and medium enterprises, diversifying the economy and aligning education with labor market needs. Improving education accessibility and quality, especially in marginalized regions like the Rif and Atlas, is crucial. Investments in health care, infrastructure and economic diversification in these regions would help reduce exclusion and promote social cohesion. Local authorities should play a greater role in decision-making to develop tailored solutions that address grievances and promote equality.

A key reform priority is establishing strong and independent political parties. Over the years, Morocco’s political landscape has been shaped by weak and fragmented parties that struggle to act as effective opposition forces. Strengthening political institutions, enhancing party independence and reducing state interference are essential steps toward a more democratic and accountable system.

To tackle environmental challenges, Morocco must critically assess the Green Morocco Plan, which has contributed to water depletion and heightened vulnerabilities in marginalized communities. The country should implement efficient water management practices, expand wastewater recycling and accelerate the transition to solar and wind energy. Development programs should prioritize water conservation, with sustained investment in desalination and efficient irrigation systems suited to the country’s semi-arid conditions. Additionally, establishing evaluation mechanisms to monitor the implementation of strategic projects like the Green Morocco Plan is necessary to ensure long-term sustainability and effectiveness.

Reforming the public sector in education is another critical priority. Reliance on private education alone will not address systemic shortcomings. Instead, the government must invest in strengthening public schools, improving teacher training and ensuring equitable access to quality education across all regions. Without these reforms, disparities in educational opportunities will persist and further deepen socioeconomic inequalities.

Most importantly, these challenges cannot be fully addressed without genuine political reforms. Without democratization, the issues of inequality, inefficiency and exclusion will remain unresolved. Reforms that threaten the monarchy and the Makhzen’s political and economic

dominance are often dismissed in favor of short-term fixes that fail to deliver sustainable development. This perpetuates corruption, patronage networks and ineffective governance, deepening inequality and mistrust.

Democratization requires limiting the powers of the king and the Makhzen and transferring power to elected institutions to create a more accountable political system. Moving forward with democratization and decentralization could also play a crucial role in resolving the Western Sahara issue by promoting regional autonomy and local governance. Maintaining and consolidating the bargaining power of labor unions is equally essential in protecting workers' rights and addressing economic disparities. Additionally, providing technical expertise and resources to parliament can enhance legislative oversight and governance efficiency, ensuring that policy decisions are more transparent and effective.

International actors have a role in pushing for reforms that promote transparency and protect human rights. However, the European Union and other international partners often prioritize stability, counter-terrorism, migration control and strategic alliances over meaningful democratic progress. This tacit support for authoritarian practices undermines efforts to build a more inclusive and equitable Morocco.

Ultimately, addressing Morocco's challenges requires a holistic approach that combines political reform, economic restructuring and social development. Without meaningful change, persistent inequalities, environmental degradation and governance shortcomings will continue to hinder Morocco's long-term stability and prosperity.