

*Embassy of the Kingdom of Morocco
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سفارة المملكة المغربية
كانبرا

Submission to the inquiry into strengthening Australia's trade and investment relations with Africa

I. Introduction

As a stable and strategically located entry point to Africa, Morocco provides a distinctive platform for Australia to enhance Australia's increasing involvement with African economies. This engagement offers a significant opportunity to diversify trade relationships, bolster supply chains, and broaden investment opportunities throughout the continent.

This submission, presented by the Embassy of the Kingdom of Morocco in Canberra, seeks to underscore areas where bilateral collaboration between Morocco and Australia can yield mutual advantages while positively impacting broader African development. The document commences with an overview of the Moroccan economy, detailing its structural strengths, geographic benefits, and ongoing reforms aimed at improving competitiveness. It subsequently analyzes the significance of key assets such as Tanger Med Port, Africa's largest port by TEU capacity and Morocco's vibrant investment environment, bolstered by the New Investment Charter.

A review of Morocco's principal economic sectors follows. The submission concludes by pinpointing specific opportunities for collaboration between the two nations and examining how enhanced Morocco-Australia cooperation can strengthen Africa's economic integration, connectivity, and sustainable development.

II. Highlight on the Moroccan Economy

Morocco is the only African country with both an Atlantic and a Mediterranean coast. In 2024, it was the fifth largest economy in Africa, with a nominal GDP of AU \$240 billion and an annual growth rate of 3.2%, higher than the 2.8% rate posted by the continent as a whole. The International Monetary Fund (IMF) predicts that Morocco's economy will continue to expand for the rest of this decade, with an average annual growth rate of 3.7% between 2025 and 2030.

Morocco continues to cement its position as one of the foremost investment destinations in Africa. It is positioned among the top five most attractive economies on the continent, retaining its place in the upper echelon despite a fluctuating global landscape. This resilience is credited to Morocco's political stability, sound governance, and proactive industrial and diplomatic strategies that have reinforced its reputation as a regional hub.

Morocco's combination of macroeconomic resilience and commercial openness, coupled with targeted reforms and sectoral diversification, make it a solid and reliable destination for institutional investors.

Key growth sectors include automotive, aerospace, renewable energy, mining and tourism.

Morocco has rapidly emerged as a significant player in the global manufacturing landscape, transitioning from a traditional economy to a diversified industrial powerhouse. Its focus on multi-sector manufacturing has yielded impressive results. This shift reflects a redefined economic model, building an ecosystem of cross-industry synergies, advanced technology integration, and global partnerships.

In recent years, measures have been implemented to stimulate investment from the private sector and develop higher valued added industrial activities. The percentage of Morocco's GDP accounted for by primary sector activities such as agriculture and fishing has fallen over the last quarter-century or so, from 18.1% in 1998 to 12.6% in 2018 and 12.3% in 2023. Together, the industrial and services sectors now constitute almost 90% of the country's national income.

III. Morocco's Economy Key sectors

a) Automotive :

Morocco's automotive industry is at the forefront of smart manufacturing, recording a 36% increase in production in the first half of 2025, reaching over 350,000 vehicles. Production capacity has doubled within a decade, crossing one million vehicles in 2025, making Morocco Africa's undisputed leader.

Global players such as Renault and Stellantis have anchored Morocco firmly in the international automotive value chain. Modern infrastructure, including Tangier Med port and the upcoming Nador West Med port, has made the country a vital future mobility node, attracting Foreign Direct Investments in automotive components and spare parts.

b) Aerospace

Beyond automotive, aerospace has become a second pillar of growth. **Morocco is a rising competitor in global aerospace manufacturing**, ranking 20th globally, Morocco's aerospace exports are projected to double to \$4 billion by 2030, supported by partnerships with Airbus, Boeing, and Safran.

Casablanca Aerospace City and Tangier free zone now host assembly lines, R&D centres, and training facilities. Morocco's proximity to Europe reduces logistical costs, while tax incentives and subsidies further attract aerospace investment. Institutions like the Institute of Aeronautical Professions (IMA) ensure a skilled workforce, aligning training programmes with global aerospace needs.

The smart manufacturing systems most used in Morocco are robotics, automation, IoT, CAD, and digital monitoring, supported by AI and data analytic, all employed by Automotive and aerospace industries.

Industrial sectors are connected in Morocco through shared infrastructure (Tangier Med, Nador West Med), supplier networks, transferable workforce skills, and cross-industry policies.

c) Renewables :

Morocco historically depended heavily on imported fossil fuels (roughly 90% of its energy needs).

In response, Morocco launched a long-term national energy strategy aiming to shift to cleaner domestic sources, leveraging its abundant solar and wind potential. As of 2022–2023, renewable energy accounted for a substantial share of overall electricity capacity.

Morocco targets 52% of installed electricity capacity from renewables by 2030. This strategic pivot toward renewables aims to enhance energy security, reduce dependency on imports, and promote long-term stability

Between 2003 and 2024, Morocco attracted USD 58 billion (FDI) into the renewable-energy sector. That constitutes about 11% of the Arab world's FDI in renewables. These investments supported 55 major projects and created more than 12,200 jobs, roughly 15% of all jobs generated by renewable-energy projects across the Arab region.

According to the government's plan, between **2024 and 2027** Morocco aims to increase annual investment in renewables from ~ 4 billion MAD to **15 billion MAD per year** (AU\$2.50 billion).

d) Mining Sector

Currently, the most sought-after mineral in Morocco is antimony. Global geopolitical uncertainty has led to a record surge in its price, rising from \$5,500 per ton in 2019 to \$56,000 in September 2025, a tenfold increase. Several foreign investors are now showing interest in this market in Morocco, including the Australian Fortescue Group. Since mineral extraction alone is not sufficient and value addition and refining are even more crucial, the Moroccan Ministry of Energy Transition is implementing a digital platform as part of its project for the first African corridor focused on “origin, transit, and certification (OTC).”

The **mining sector** accounts for approximately **10% of Morocco's GDP**, contributes **26% of the country's exports**, and employs over **40,000 people**.

The **battery sector** is a strategic priority, with an **investment potential of 400 billion Moroccan dirhams (around AUD \$59 billion) by 2030**. Three key factors attract investors: the **availability of critical minerals**, **Morocco's competitiveness**, and its **proximity to the European market**, where internal combustion vehicles will be banned starting in **2035**.

The Kingdom holds significant reserves of **phosphate, manganese, cobalt, and nickel**, along with emerging resources such as **lithium and copper**. Morocco's competitive edge in **lithium battery production** enables it to offer unit prices that are **35% lower than the global average**.

According to the latest report by the **Fraser Institute**, published in July 2025, Morocco ranks **18th out of 82 jurisdictions** assessed for **mining investment attractiveness**, gaining **nine positions compared to 2023**.

e) Tourism Sector :

In **2025**, **tourism** became the **leading sector** of Morocco's economy. In **2024**, Morocco welcomed **17.4 million tourists**, a **20% increase** compared to 2023, reaching this target **two years ahead of schedule**.

Tourism revenues reached **104 billion Moroccan dirhams (approximately 15 AUD billion)** in 2024, representing a **7.2% increase** from the previous year.

Tourism now contributes approximately **7% to Morocco's GDP** and represents a **major source of employment and foreign currency**.

Morocco has implemented a **strategic roadmap** to position itself among the **top 15 global tourist destinations**. The organization of the **Africa Cup of Nations in 2025**, and the **co-hosting of the 2030 FIFA World Cup** with **Spain and Portugal**, are driving **investment in infrastructure** and further boosting the country's appeal.

During the **first seven months of 2025**, Morocco received **11.6 million visitors**, up to **16% increase** comparing to the same period the previous year.

IV. Assets and ongoing structural reforms

a) Port of Tanger Med largest port in Africa by TEU handling : A strategic Asset of Morocco

Logistics is one of the priority sectors for investment in Morocco. The industrial port complex of *Tanger Med*, situated on the Strait of Gibraltar and directly opposite Tarifa in Spain, is Africa's largest port and connects the continent with Europe and the US. In 2024, it handled 10.2 million TEUs (up 18.9% on the previous year), making it the 17th busiest container port in the world and the only African port in the top 30.

Tanger Med has connections to more than 180 ports in 70 economies. Ships from there can reach most Western European ports in five days or under, the US in ten days and Asia Pacific (including Hong Kong) in 20 days.

The *Tanger Med Port Complex* covers 1,000 hectares and consists of *Tanger Med 1 Port* and *Tanger Med 2 Port* (each of which has two container terminals, terminals which specialise in wheeled cargos such as cars and trucks, and a logistics zone which provides warehousing, packaging and quality inspection services). It is a regional logistics hub with its own Port Community System, making the automation of administrative procedures possible along logistics chains and increasing the port's overall efficiency.

b) Openness to Foreign Direct Investments

FDI has been crucial in Morocco's manufacturing expansion. After a dip in 2023, investments rebounded by 55% in 2024, rising to MAD 25.4 billion (4.24 AUD billion). France, the UAE, the UK, and Spain remain top investors.

China's Gotion has committed 1.07 billion AUD for an EV battery plant, further diversifying Morocco's industrial base.

Morocco has an extensive network of free trade agreements (FTAs), including preferential trade agreements with 62 countries. It is a signatory to the *African Continental Free Trade Area (AfCFTA)*, which aims to create a single market for goods and services across Africa with tariffs and non-tariff barriers being gradually eliminated.

On 12 June 2025, it was announced that Chinese Mainland will remove import tariffs on goods from 53 African countries, including Morocco. Although Morocco is subject to Trump tariff currently being implemented by the US, the 10% figure that the White House announced in April 2025 that is to be imposed on Morocco is the lowest faced by any African country.

c) The new investment charter

In 2022, the Moroccan government promulgated its new investment charter, the "*Charte de l'Investissement*", which is designed to encourage private investment and support the country's Small and Medium Companies. Its aim is to raise private investment (including both domestic and foreign) by 84 billion AUD, so that it accounts for around two-third of the country's total investment, and to create 500,000 jobs by the end of 2026.

The *Charte de l'Investissement* has improved the country's business climate by streamlining administrative procedures, creating a one-stop shop to support investors, introducing a multi-layer investment support mechanism, and offering a total subsidy of up to 30% of the eligible investment amount. The maximum subsidy available for renewable energy projects, is 4.6 millions AUD million.⁵ The *Charte de l'Investissement* also provides training and guidance for Moroccan SMEs and micro-businesses and helps the country's companies expand their operations abroad.

Between May 2023, when the *Charte de l'Investissement* came into force, and June 2024, Moroccan authorities approved over 100 projects with an estimated value of 26 billion AUD and commitments to create over 96,000 jobs. Domestic businesses accounted for the majority of approved investment projects. In June 2024, the total value of approved investments had reached about one-third of the charter's target for 2022-2026, and about 20% of the job creation target had been met.

China Merchants Port Holding (a Mainland-based enterprise listed on the *Hong Kong Stock Exchange*) owns a 40% share in *Tanger Med 2 Port*, through one of its subsidiaries. It has also invested in Casablanca's *Somaport*, reflecting the rising presence of Chinese companies in Morocco.

In order to meet the rising demand for logistics, the Moroccan government introduced its *2030 National Port Strategy*, a plan to invest 11.5 billion AUD in upgrading and expanding 27 of the country's ports. One key project is the development of *Dakhla Atlantic Port*, at an estimated cost of 2.6 Billion AUD. This aims to boost trade and investment in the southern part of the country and facilitate logistics flows from western Africa to European and American markets. The first phase of this project is expected to be completed by 2030.

V. Key Opportunities/ Areas of Cooperation between Morocco and Australia

What Morocco has/is doing	How Australia and Morocco could cooperate in this field	Expanding Africa–Australia Cooperation via Morocco
<p>Artificial Intelligence :</p> <ul style="list-style-type: none"> - UM6P's AI Movement / AI Center: Mohammed VI Polytechnic University (UM6P) hosts a major AI center (“AI Movement”), and has a “Dome of Artificial Intelligence” in Rabat, demonstrating its ambition to be a continental hub for AI research. - The AI Movement at UM6P has been designated a UNESCO Category II center, making it an international hub for AI expertise. - AI & Data Analytics Unit (AIDA): UM6P’s Digital Ecosystem Office runs AIDA, which deploys AI / ML models, processes massive data, and supports both research and operational insights. - National AI Forum: In July 2025, UM6P hosted Morocco’s first National Forum on AI, with participation from government, private sector, and academia. They discussed ethical AI, and applications in education, health, agriculture, industrial modernization, etc. - AI in Education: UM6P rolled out ChatGPT Edu, powered by GPT-4, for personalized learning, tutoring, CV coaching, exam preparation, and assisting professors in administrative tasks. - AI Research Projects: UM6P research on human-drone interaction for industrial inspection: deep learning + reinforcement learning for non-destructive inspection; Work on 	<ul style="list-style-type: none"> • As Australia has a strong research capacity in AI / machine learning, both in academia and industry, partnering with UM6P could create a bridge for joint research, especially in “AI for good” (education, agriculture, water, health). • Australia could help fund or co-develop capacity-building programs at UM6P (PhD scholarships, joint labs). • Joint development of AI applications for socio-economic challenges in Morocco (e.g : predictive analytics for water management, crop yields, or student dropout risk) • Technology transfer: Australia’s AI startups or companies could exchange solutions with their moroccan counterparts (chatbots, analytics, drones for inspection) via UM6P. 	<p>Morocco (through UM6P and national digital programs) is among Africa’s fastest-growing AI hubs. Cooperation with Australia, a country with strong AI, data science, and computational sciences can enhance Africa-Australia Partnership in five major ways:</p> <p>A. Creating a Pan-African AI Knowledge Hub</p> <p>UM6P’s UNESCO-recognized AI Movement can become a continental training center. African students, engineers and researchers could access Australian experts through: joint degrees; research labs; PhD exchanges</p> <p>➔ This reduces Africa’s dependence on Europe/US for advanced AI skilling.</p> <p>B. AI for Agriculture and Food Security</p> <p>Africa loses 73 billion AUD annually to low agricultural productivity. AI tools developed jointly by Morocco and Australia (both have strong agri-tech sectors) could help:</p> <ul style="list-style-type: none"> • Predict crop yields and rainfall • Improve irrigation efficiency • Reduce fertilizer waste • Fight pests through early detection • Prevent post-harvest loss <p>➔ Higher food security for over 300 million Africans in agriculture.</p> <p>C. AI for Water Scarcity & Climate</p> <p>Africa is the most climate-vulnerable continent. Australian water-management +</p>

<p>creative AI (image / audio / video generation) by combining generative models, sketch-to-image, etc ;Projects on conversational agents using BDI architecture + LLMs (goal-oriented chatbots with planning and reasoning).</p> <ul style="list-style-type: none"> - Policy & Ethics: There's a strong emphasis at UM6P on ethical, responsible AI. The "AI Movement" has raised governance questions, and the Kingdom of Morocco is pushing for "effective, ethical use" of AI through a partnership between the Ministry of Digital Transition and UM6P. - Collective Intelligence: UM6P's School of Collective Intelligence (SCI) researches how crowds, systems, and technology work together. 		<p>Moroccan AI data systems could help African countries:</p> <ul style="list-style-type: none"> • Predict droughts • Manage water reservoirs • Optimize desalination and irrigation • Reduce water losses <p>D. African Tech Startups Expansion</p> <p>Morocco is a hub market for African tech. Australia can fund or incubate:</p> <ul style="list-style-type: none"> • continent-wide AI startups • fintech • healthtech • agritech • climate tech
<p>Blue Economy/ Fishing/ Maritime Tourism</p> <p>In 2024, Morocco's national fish production reached 1.42 million tonnes, generating 16.3 billion MAD (~ US\$ 1.6-1.7 bn) due to strong reserve management and 30 fisheries management plans.</p> <ul style="list-style-type: none"> - Processing Infrastructure: 518 onshore processing units and 311 sea-based freezing units. Almost 60% of coastal catches are processed into preserved, fresh, salted, or frozen products. - International Exports: Moroccan fish products are exported to many international markets, boosting its role in the global seafood supply chain. - Tourism: On the "blue tourism" front, coastal tourism is strong (surf tourism is booming, especially in 	<ul style="list-style-type: none"> - Sustainable Fishing Practices: Australia has expertise in marine sustainability, fisheries management, and aquaculture. Joint programs could help Morocco optimize fishery resource management, increase value in its seafood exports. - Marine Technology / Research: Collaborate to develop AI-driven marine monitoring: satellite / drone surveillance of fishing zones, predictive models for fish stocks, climate-resilience in the marine ecosystem. - Blue Tourism Development: <p><i>Surf tourism tech:</i> Australian surf tourism operators or tech firms</p>	<p>Africa has:</p> <ul style="list-style-type: none"> • 38 coastal states • 26,000 km of coastline • major fishing zones (North Africa, West Africa, East Africa) But it loses value to foreign fleets, overfishing, and limited processing capacity. <p>➔ Cooperation between Morocco and Australia can jointly help Africa transform the sector.</p> <p>A. Sustainable Fisheries</p> <p>Australia has some of the world's best fishery-management systems. Applying these across Africa (via Morocco as a training hub) would:</p> <ul style="list-style-type: none"> • reduce overfishing • protect marine ecosystems • increase long-term fish stocks • improve export quality <p>➔ Sustainability for a sector that employs 12 million Africans.</p>

<p>Atlantic coastal towns like Taghazout and Imsouane).</p>	<p>could partner to build sustainable surf resorts, eco-lodges, marinas, with training on environmental conservation ;</p> <p>Marine biodiversity tourism: Developing diving, marine-life tours, conservation-based tourist circuits (with data-driven ecosystem management).</p> <ul style="list-style-type: none"> - Value-Added Processing & Supply Chains: Joint investment in processing infrastructure (freezing, packaging) to increase Moroccan seafood value. Australian companies in logistics / cold chain might invest or collaborate with Moroccan processors. - Capacity Building: Training programs (e.g via OFPPT) for Moroccan fishers / entrepreneurs on business, sustainability, and ecotourism. Use AI for optimizing harvesting and distribution 	<p>B. Boosting Africa's Seafood Processing Industries</p> <p>Since Morocco is Africa's most advanced seafood processor (over 500 processing plants). The cooperation between Morocco and Australia can :</p> <ul style="list-style-type: none"> • build joint processing centers • transfer freezing & packaging technologies • modernize supply chains <p>African countries like Mauritania, Senegal, Angola, Tanzania, Mozambique could move from: raw exports → high-value exports.</p> <p>Value addition could increase African seafood revenue by \$1.5–4 billion annually.</p> <p>Marine Technology & Ocean Data for African Research Morocco–Australia cooperation in:</p> <ul style="list-style-type: none"> • oceanography • remote sensing • marine drones • AI for marine data <p>Could help African coastal countries better predict:</p> <ul style="list-style-type: none"> • fish migration • climate events • coastal erosion <p>→</p> <p>This strengthens Africa's blue economy strategy under Agenda 2063.</p>
<p>Automobile / Mobility / Electric Vehicles</p> <ul style="list-style-type: none"> - Production Scale: In 2023, Morocco manufactured 535,825 vehicles, ranking 24th globally. - Exports: Automotive exports reached \$13.9 billion in 2023. - Jobs & Industrial Backbone: The sector employs around 220,000 people, with more than 230 Tier-1 and Tier-2 suppliers. 	<ul style="list-style-type: none"> - EV / Battery Production: Australian firms could partner with Moroccan battery projects either in manufacturing or technology (battery chemistry, recycling). Australia has strong mining (lithium, rare earths) and battery research capacity. - Automotive R&D: Through UM6P (or other Moroccan universities), set up joint R&D for EV engineering, smart manufacturing, AI in cars 	<p>Morocco is Africa's number 1 car producer and wants to be a major EV hub. Australia is a global leader in lithium, nickel, cobalt, and battery research. Together, they can transform African industrialization.</p> <p>Building Africa's First Integrated EV Value Chain</p> <p>Africa exports raw materials (lithium, cobalt) but captures almost no value. With Morocco–Australia cooperation:</p>

<p>- EV & Battery Ambition:</p> <p>Morocco is actively courting EV battery manufacturers: the government is in discussions with Chinese battery companies (e.g. BTR, CNGR) for battery plants. The goal is for up to 60% of exported cars to be electric by 2030.</p> <p>Automotive Cluster & Strategy: Morocco's Industrial Acceleration Plan, automotive cities (Kenitra, Tangier), and special economic zones all support car manufacturing.</p> <p>Recent Expansion:</p> <p>Stellantis is expanding its Kenitra plant (reported €1.2 b investment) to boost EV / small car capacity.</p>	<p>(autonomous driving, predictive maintenance).</p> <ul style="list-style-type: none"> - Supply Chain Integration: Australian automotive suppliers (METS companies) could supply parts, systems, or services to Moroccan car manufacturers, especially as they scale EV production. - Skill Development: Training programs for Moroccan engineers / technicians in EV tech, supported by Australian universities or vocational institutions. - Sustainable Mobility Pilot Projects: Joint development of EV fleets in Morocco (taxis, public transport), with pilot trials supported by Australian companies or government funds. 	<ul style="list-style-type: none"> • batteries can be produced in Morocco (with Australian raw materials or expertise, like the Chinese project in Morocco) • charging networks can be standardized continent-wide <p>➔ This could trigger the first African EV ecosystem.</p> <p>Employment & Skills Development</p> <p>The automotive sector in North Africa already employs >300,000 people. A pan-African mobility transformation could create:</p> <ul style="list-style-type: none"> • 1 million new jobs in assembly • 500,000 jobs in parts manufacturing • R&D roles in software, batteries, electronics <p>Australia can support training & technical education programs.</p> <p>Battery Recycling & Circular Economy Across Africa</p> <p>Australia has advanced recycling systems. Morocco can host Africa's first modern EV battery recycling hub, serving: West Africa; North Africa; Sahel; Central Africa</p> <p>➔ This prevents environmental damage while capturing economic value.</p> <p>Public Transport Electrification</p> <p>Australian engineering + Moroccan manufacturing = affordable African EV buses, taxis, fleets. This is essential for:</p> <ul style="list-style-type: none"> • emissions reduction • cleaner cities • cheaper transport <p>➔ Australia will help Africa in its green energy transition</p>
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VI. Conclusion :

In summary, Morocco serves as a strategic entry point for Australia's involvement in African markets, featuring strong infrastructure, a vibrant investment environment, and a variety of economic sectors. By capitalizing on Morocco's resources and reforms, bilateral collaboration can unveil mutually advantageous opportunities for trade, investment, and knowledge exchange. Enhancing the relationship between Morocco and Australia not only promotes the interests of both countries but also aids in the wider economic integration of Africa, improved connectivity, and sustainable development throughout the continent.

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Topic / Section	Suggested Reference / Source
Overall economic outlook, structural reforms & investment climate	Organisation for Economic Co-operation and Development (OECD), <i>Economic Survey: Morocco 2024</i> — discusses reforms, sectoral incentives, economic performance. (OECD)
Industrial diversification (automotive, aerospace, renewable energy, manufacturing)	Lazard Asset Management, “Morocco: A Dynamic Frontier Market”, <i>Emerging Markets Monitor</i>, November 2025 — overview of leading industries, automotive & aerospace exports, and structural transformation. (Lazard Asset Management)
Key sectors: automotive & aerospace hub status	Carnegie Endowment for International Peace, “Morocco’s Long Road Toward Economic Transformation”, 2024 — analysis of how automotive & aeronautics industries grew, FDI impact, manufacturing share of GDP. (Carnegie Endowment)
Port & logistics infrastructure — Tanger Med as asset / gateway	Public-report data on Tanger Med: volume handled, link to industrial free-zone at Tangier, logistics hub role. E.g., reports cited by HKTDC / Belt & Road Portal. (beltandroad.hktdc.com)
Renewable energy & the green energy transition	Reports in investment-oriented publications describing Morocco’s renewable energy initiatives, green hydrogen projects, energy strategy aiming for high renewables share. (NextEra)
Investment Charter and incentives for foreign & domestic investment, structural reforms	Analysis of the 2022 Investment Charter and its provisions for bonuses/incentives in priority sectors (industry, energy, tourism, logistics, etc.) — as described in OECD Economic Survey and other investment-climate reports. (OECD)
Tourism, services & diversified economy sectors	Reports and sources that describe growth in tourism, services and contribution of non-agricultural sectors to GDP — as part of Morocco’s economic diversification. (OECD)