

SECTORAL ACTIVITIES PROGRAMME

Working Paper

**Private employment
agencies in Morocco**

by

Ghada Ahmed

Working papers are preliminary documents circulated
to stimulate discussion and obtain comments

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Preface

This paper, which examines private employment agencies and temporary agency work in a country having ratified the Private Employment Agencies Convention, 1997 (No. 181), was prepared as background research for an Issues paper entitled *Private employment agencies, promotion of decent work and improving the functioning of labour markets in private services sectors* (Geneva, ILO, 2011). Both documents were written in preparation for the Global Dialogue Forum on the Role of Private Employment Agencies in Promoting Decent Work and Improving the Functioning of Labour Markets in Private Services Sectors, Geneva, 18–19 October 2011.

Morocco's labour market faces many challenges and opportunities. Approximately 50 per cent of the population is under 25 years of age, and unemployment is particularly high in urban areas and among educated young people. In 2011, Morocco was the largest market in North Africa for employment agencies, with an estimated 1,200 agencies. Leading agencies have expressed concern about youth employment, and their commitment to actively work on the issue. Agencies are pushing for better regulation and setting industry standards, aiming to raise the industry's profile, establish its legitimacy and protect their brands in countries where the industry is either underdeveloped or plagued with bad practices. Leading private employment agencies entered the Middle East and North Africa (MENA) markets relatively recently, and remain concentrated in Arabian Gulf countries and Morocco. They started to develop the MENA market by promoting industry regulation and collaborating with organizations on youth employment.

This working paper and the Global Dialogue Forum are part of the ILO's Sectoral Activities Programme, aimed at assisting governments and employers' and workers' organizations to develop their capacities to deal equitably and effectively with social and labour issues in specific economic sectors.

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Executive summary

Private employment agencies (PrEAs) are part of the global human resources (HR) industry with temporary staffing constituting approximately 72 per cent of the market. Industry growth followed changes in corporate restructuring that favoured a flexible workforce to improve competitiveness and respond to business cycle fluctuations. Transnational firms now prefer outsourcing many HR activities to leading global firms such as Adecco and Manpower.

An analysis of the global value chains of the private employment industry reveals that industry firms upgraded by expanding geographically, providing services in most sectors, developing multiple products, and improving processes through the use of technology. Firms started expanding internationally almost 50 years ago as labour markets started deregulating, and PrEAs followed many of their client firms that were growing internationally. Their global expansion made them key players at the national and international levels in the development of labour market regulation and partners in employment and job creation in many countries.

Leading global PrEAs entered the Middle East and North Africa (MENA) markets recently. They are concentrated in the oil-rich Arabian Gulf countries, Morocco and Tunisia. They have been starting to develop the MENA market by promoting industry regulation and partnering with organizations on youth employment problems. Shortly after Manpower entered the Moroccan market, it started promoting industry regulation according to international standards, which prompted the Government to ratify the ILO's Private Employment Agencies Convention, 1997 (No. 181), in May 1999. However, the Moroccan labour code is still quite restrictive and limits labour market flexibility.

Morocco's employment market is fraught with challenges and opportunities. Approximately 50 per cent of the population is under 25 years of age, and unemployment is particularly high in urban areas and among educated youth. Many educated Moroccans neither have sufficient transition-to-work mechanisms nor possess the right skills that meet the job market needs in industries such as information technology and manufacturing.

Morocco is now the largest market in North Africa for PrEAs, with an estimated 1,200 agencies. Leading firms have upgraded, comply with the labour code, are usually ISO 9001 certified, and are engaged in youth training and transition to work programmes. Manpower Maroc is playing a major role in the country by: advocating the development of industry standards; improving regulation, monitoring and evaluation; and enhancing youth employability (see figure 1).

Figure 1. Leading firms engagement process in Morocco



Key findings about PrEAs in Morocco

- *Leading global firms played a major role in Morocco's ratification of ILO's Convention No. 181. Morocco ratified in 1999 after Manpower started operating in Morocco and worked with the Government to ratify the Convention.*

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- *Leading global firms push for better regulation and setting industry standards.* Global firms are faced with raising the industry's profile, establishing its legitimacy and protecting their brands in countries where the industry is either underdeveloped or plagued with bad practices. Manpower Maroc, Adecco Maroc and Crit are playing a major role, along with a few local firms, to establish a better platform for the industry, to weed out poor practices and to upgrade the industry.
 - *The Moroccan labour code remains restrictive.* There are limitations to the operations of PrEAs such as the six months maximum length of temporary work assignment and an unenforceable agency registration requirement, which have a negative impact on PrEAs and perhaps also on their workers.
 - *Global PrEAs in Morocco work with labour unions.* Manpower Maroc started working with Moroccan labour unions since the opening of its country offices. This enabled PrEAs to gain the support of trade unions in ratification of Convention No. 181 and promoting changes to the labour code.
 - *Leading PrEAs provide better labour market intelligence.* They are more connected to employers and therefore are able to supply the Moroccan Government with information on market demand for skills. They also work with Moroccan training and education institutions to better prepare young workers for the job market.
 - *The industry lacks any mechanism for oversight, monitoring and evaluation and rating of practices.*
 - *Leading firms work in the formal sector and with qualified professionals.* They are generally servicing large multinational clients. Agency jobs are mostly in the administrative and technical fields that require qualifications or college degrees.
 - *Leading PrEAs are trying to coordinate sector activities.* Manpower Maroc and a few other firms organized themselves through the industry associations. However, membership levels are low and communication between the firms or their associations and the Government is suboptimal. The industry is fragmented in Morocco and tends to regard the public employment agency as a rival instead of a collaborator.
 - *Leading PrEAs are concerned about youth employment and are actively working with the issue.* For example, Manpower Maroc, Adecco Maroc, RMO Maroc and others are formally partnering with institutions to improve skills, are raising awareness about the job market and are tapping into export of professional labour.

Key recommendations for the Moroccan Government and trade unions

- Improve labour regulation to be more compatible with international standards and address restrictions.
- Create a steering committee to dialogue with the private employment agencies and trade unions to improve communication, set standards, track industry statistics, monitor and evaluate agency work compliance, and establish an agency-rating system.
- Develop public communication channels including website to inform jobseekers and employers about agency work in Morocco.

Introduction

Access to a flexible labour market and a qualified talent pool are key competitiveness factors for the public and private sectors. Competitive firms seek a mobile workforce that adjusts to business cycle fluctuations and accommodates changes in organizational structures. Also workers seek various employment arrangements that facilitate their entry (or re-entry) to the job market, provide them with experience with different organizations and assist them with options such as work schedules and choice of employer. These changes in work arrangement preferences make private employment agencies (PrEAs) important to the efficient functioning of labour markets (Onaran Yüksel and Siivgin, 2008). PrEAs are part of the HR services industry, which falls under the private services sectors in general, and is considered part of the business process-outsourcing (BPO) activities.

These agencies are defined as for-profit, private entities that bring jobseekers and prospective user enterprises together, for a fee that is paid by the user enterprise, for the purpose of effecting a traditional employment relationship (Staffing Industry Analysts, 2010). There is a triangular relationship that governs agency work with two types of contracts: an employment contract between the private employment agency and the worker and a commercial service contract between the employment agency and the user enterprise (Onaran Yüksel and Siivgin, 2008). Private law, labour law, Convention No. 181 and corporate governance policies regulate the commercial and labour activities of PrEAs. Convention No. 181 provides a regulatory framework that shapes the role of PrEAs within the national context to improve the efficiency of the labour market and develop collaboration of between public and private employment services.

These agencies bridge the gap between the supply and the demand for labour by providing market intelligence on jobs, skills, training and managing people. Agency work helps create new jobs and helps the young, women, and less skilled people to join or reintegrate into the labour market. This report provides the global framework for PrEAs, their value chain and geographic expansion to the MENA region. The report focuses on the Moroccan employment market, the operations of PrEAs in Morocco, their supporting institutions, the role of PrEAs in youth employment and the leading agencies in Morocco. The final section of the report provides an analysis and some recommendations that could facilitate the development of the PrEA industry in Morocco and overcome some of the obstacles it currently faces.

Global framework

Revenues from HR services are generated from temporary staffing, search and placement (permanent staffing), and corporate training services. Temporary staffing is the largest segment of the global HR services accounting for about 72 per cent of the market's total value (Datamonitor, 2010b). In 2009, the global temporary staffing industry generated €203 billion in revenues (Ciett, 2011). Adecco is the leading player with a market share of about 4.5 per cent (Datamonitor, 2010b). The industry is used as an early indicator for aggregate economic and employment activity in developed economies.

The International Confederation of Private Employment Agencies (Ciett) estimates that there are over 72,000 PrEAs worldwide, with 169,000 branches and 741,000 agency internal staff (Ciett, 2011). The global market is fragmented and composed of small players and large international firms. There is little differentiation between firms (Ahmed, 2010). Barriers to market entry are fairly low and substitution is high. Global industry growth is facilitated by labour market deregulation, mergers and acquisitions, outsourcing and off shoring activity, demand for talent and information technology

(Ahmed, 2010). The market is highly competitive with increasing numbers of consolidation and merger activity.

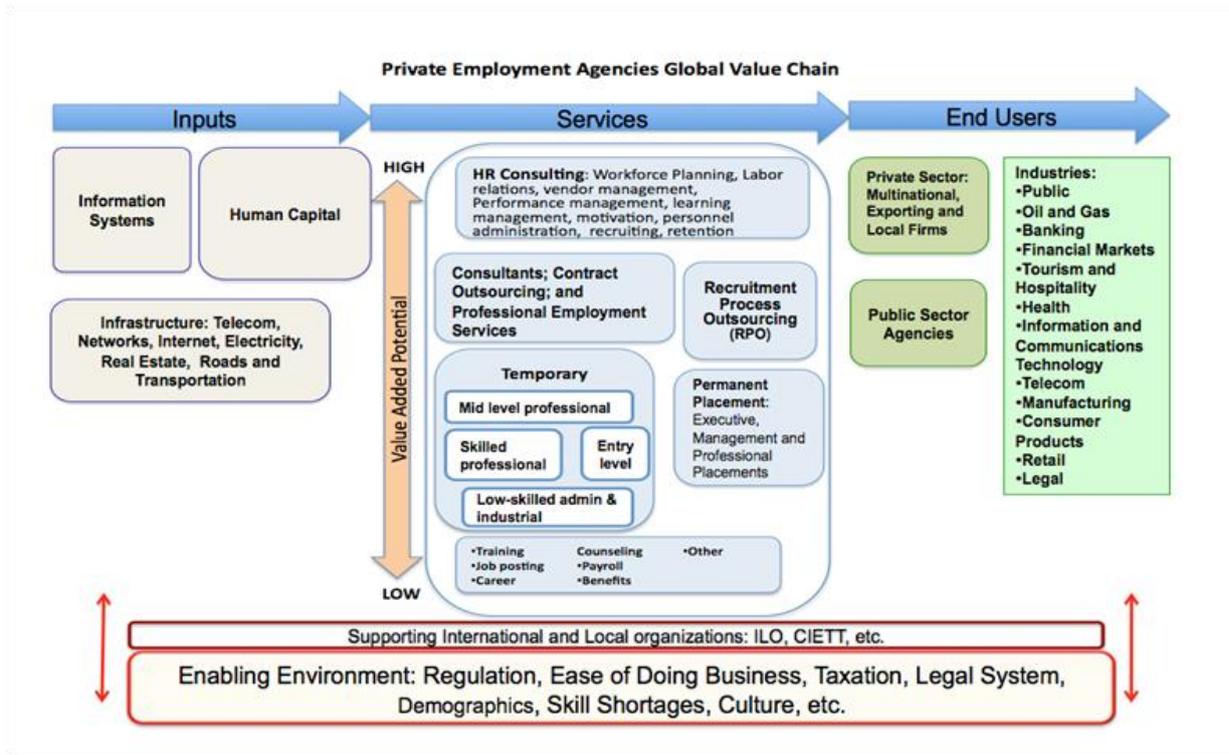
Global firms are territorially embedded and their branch offices are dispersed and highly decentralized (Ahmed, 2010). Large firms benefit from significant scale economies in marketing, purchasing, recruitment, and back-office operations (Ahmed, 2010). The top ten leading global firms are Adecco, Randstad, Manpower Inc., USG People, Allegis Group, Kelly Services, Recruit Staffing and Staff Service, Hays PLC, Robert Half, and Advantage Resourcing (Ciett, 2011). Many smaller agencies within the market specialize in recruitment for specific industries which gives them a degree of service differentiation (Datamonitor, 2010a). Some agencies differentiate by offering value added services such as training to clients. For example, Manpower Inc. offers over 3,600 online courses through its Global Learning Center (Datamonitor, 2010a).

Global value chains (GVC) of employment agencies

The PrEA industry value chain (see figure 1) has three primary components: industry inputs, services provided and end users; and moving from left to right on the diagram, PrEAs' core business is about recruitment, selection and placement of human capital (Ahmed, 2010). The industry is driven by customer demand, is highly relational and is impacted by the regulatory environment (Ahmed, 2010). PrEAs upgrade by expanding geographically, improving processes, diversifying products and servicing multiple sectors and organizational levels.

The industry's primary inputs are human capital, information technology and local infrastructure; and the end users are employers in the public and private sectors (Ahmed, 2010). Most important is the industry's enabling environment and supporting institutions, which constitute the fourth and fifth components of the GVC and have a significant impact on each stage in the chain, type and level of service, and degree of market penetration (Ahmed, 2010). Firms engage in multiple activities by bundling or unbundling their services. Value-added activities in the chain occur when firms bundle different activities and become a one-stop shop of HR solutions to their clients. Demand for services depends on global trends, such as demand for skilled workers, as well as economic growth (see figure 2) (Datamonitor, 2010b).

Figure 2. Global value chain of PrEAs



Source: Author.

Figure 3. Global supply and demand for labour



Source: Adecco 2011 and the Boston Consulting Group 2010 analysis (Gap = Supply compound annual growth rate – demand compound annual growth rate).

PrEAs in the Middle East and North Africa (MENA)

Global PrEAs have been expanding internationally for over fifty years (Ward, 2004). However, it was only in the 1990s that they started accelerating their growth and entered new markets such as the MENA region (see table 1). Their new market entry challenged the existing labour market organization and regulation in countries such as in Morocco and Tunisia, where they pushed for better industry regulation.

There are two trends in the global PrEAs' entry to the MENA market. One trend is either by acquiring firms or opening offices in oil-rich Gulf Cooperation Council countries (GCC), such as the United Arab Emirates and Saudi Arabia. For example, in 2008, Manpower Inc. expanded to the Middle East Gulf region by acquiring Clarendon Parker. Manpower's acquisition instantly made it a major Middle East player, with offices in the United Arab Emirates, Kuwait, Saudi Arabia, Bahrain, and Qatar. On the other hand, Robert Half, the accounting, finance and technology specialist firm, opened its first branch office in the United Arab Emirates in 2009. The presence of some firms such as Manpower in the United Arab Emirates raised the profile of the industry as a partner in developing the employment market for youth. Global PrEAs in the GCC countries target the professional employment market in leading sectors such as oil and gas, banking and hospitality. These industries depend on fixed-term employment contracts and global recruitment of skilled professionals.

Manpower and Silatech

"Established a one-year framework in September 2009 to exchange experience and practices through piloting innovative programmes for young people. The pilot programmes will draw on Manpower's global expertise, including the engagement of employers and measurement of employer needs, candidate assessment and training, job-readiness/soft skill initiatives, the creation of effective workforce development partner linkages and capacity building among service partners. Following the pilot, Manpower and Silatech will engage in a multi-year joint venture for on-the-ground service delivery across the region. It is hoped that over the long term, the initiative will increase the transparency of local labour markets and employment practices, helping young people overcome cultural as well as skills barriers to employment and entrepreneurship.

Source: Manpower; Pelzer, 2009.

The other trend is global firms entering the Maghreb¹ market. Global firms entered Morocco and Tunisia to service European multinational firms that were operating in these two countries. Some of these multinationals were already established clients for PrEA companies such as Adecco and Manpower. Shortly after Manpower entered Morocco, it began promoting industry regulation and raising the profile of the industry as a partner in youth employment. Consequently, the Moroccan Government ratified ILO Convention No. 181 in 1999 and revised some of its labour code in 2004. Currently, Manpower is in dialogue with the Tunisian authorities to ratify Convention No. 181 (Belahrach, 2011).

¹ Maghreb comprises Algeria, Libya, Mauritania, Morocco and Tunisia.

Table 1. Global PrEAs in MENA

Firm	Overview	MENA office	Service sectors
Top global firms			
Adecco	Headquartered in Glattbrugg, Switzerland. The company is a \$33billion company with over 31,000 employees and 6,000 offices in 60 countries and territories. Adecco has over 150,000 clients and 700,000 placements daily	United Arab Emirates (Dubai and Abu Dhabi), Morocco, Tunisia, Turkey and Israel. <i>Planning to open a Cairo office in 2012</i>	Engineering, manufacturing, oil and gas, banking, financial markets, retail, logistics, hospitality, transport, and media
Manpower	Headquartered in Milwaukee, Wisconsin. The company is a US\$22 billion publicly held company with over 30,000 employees; has a global network of 4,000 offices in 82 countries and territories; has 400,000 clients/ year (SMES and MNCs) in all sectors; and placed 4 million people in 2008	United Arab Emirates (Dubai and Abu Dhabi), Kuwait, Bahrain, Qatar, Saudi Arabia, Morocco, Tunisia, Turkey and Israel	Engineering, manufacturing, construction, defence and aerospace, property and real estate, medical, administrative, banking, IT, telecom, sales, marketing, and HR
Kelly Services	Headquartered in Troy, Michigan, the company is a US\$5.5 billion organization with 10,000 employees. It operates in 36 countries and regions and provides employment to over 650,000 people annually	Turkey and UAE	Provides workforce management services and HR solutions. Offers temporary staffing, permanent placement, outsourcing, and consulting services. Provides industry-specific services such as in engineering, hospitality and government
Randstad	Headquartered in Diemen, the Netherlands, the company is a US\$23 billion corporation and employs about 386,770 people	United Arab Emirates (Dubai and Abu Dhabi), Qatar, Oman (Muscat) and Turkey	Accounting and finance, banking and financial services, retail, hospitality, media and PR, construction, engineering, HR and business support, IT, telecom, oil and gas, pharmaceuticals, and banking and financial markets, sales, and marketing
Advantage Resourcing (formerly Radia)	Privately held corporation with headquarter offices in the US, Japan, UK, and Australia	UAE (Dubai)	Provides global workforce recruiting and placement services. Operating with business units as Technical Resourcing, Staffing, Professional and Advantage BPO for Business Process, Recruitment Process and Workforce Management solutions
Other global firms with operations in MENA			
Hays	Headquartered in the United Kingdom	UAE (Dubai)	Accounting and finance, banking, retail, hospitality, media and PR, construction, engineering, HR and business support, IT, telecom, oil and gas, pharmaceuticals, and banking and financial markets, security, sales, and marketing

Firm	Overview	MENA office	Service sectors
Robert Half International	Headquartered in the United States	UAE (Dubai)	Accounting and finance, banking and technology
Michael Page	Headquartered in the United Kingdom	Turkey and UAE (Dubai and Abu Dhabi), Tunisia, Algeria, Morocco and Egypt.	Finance, accounting, banking, technology, engineering, manufacturing, legal, HR, marketing, administrative, supply chain, procurement, construction, sales, property and real estate, and retail
Hudson Highland Group	Headquartered in the United States	UAE (Dubai)	Accounting and finance, banking and financial services, HR, IT, legal, sales, and marketing
Brunel International N.V.	Headquartered in the Netherlands	UAE (Dubai and Abu Dhabi) and Qatar	Oil and gas
Monster Monster Gulf	Headquartered in the United States	UAE, Qatar, Saudi Arabia, Oman, Kuwait, Lebanon, Jordan and Turkey	Online recruitment
SThree	Headquartered in the United Kingdom	UAE (Dubai)	ICT, accounting and finance, banking, engineering, and HR
Group Crit	Headquartered in France, the company is a US\$1.3 billion group that has a global network of nearly 450 employment agencies	Morocco and Tunisia	Engineering, maintenance and technical

Source: Author, based on Ahmed, 2010; Boustani, 2011.

ILO Convention No. 181

There are 18 MENA members in the ILO. However, only two countries, Morocco and Algeria, ratified ILO Convention No. 181. The Convention sets the general parameters for the regulation, placement and employment of workers by these agencies. Morocco ratified the Convention in October 1999 and Algeria in June 2006 (ILO, 2009).²

There appears to be no link between ratification in Morocco and Algeria and the number of global PrEAS present in these countries (Belhrach, 2011). For example, Adecco established Adecco Maroc in 1991 and Manpower established Manpower Maroc in 1997, prior to Morocco's ratification (Adecco, 2011; Manpower, 2011). On the other hand, there are not any global PrEAs in Algeria. Algeria's investment and business environment deters multinational firms from operating (Belhrach, 2011).

Leading firms in Morocco pressed for better industry regulation that led to Morocco's ratification, raised the industry's profile and engaged labour unions. Manpower Maroc advocated the adoption of Convention No. 181 to improve the regulatory environment towards a more flexible labour market in Morocco and increase investments and job creation (Belhrach, 2011). The Moroccan Government is benefiting from its ratification, using that to attract investments in priority sectors such as offshore services and manufacturing (Benkrich, 2011).

² By March 2011, 23 countries had ratified.

Morocco's employment market

More than 65 per cent of Morocco's population is between the ages of 15 and 64 (50 per cent of the population is under 25 years of age) (Datamonitor, 2010c; Haut-Commissariat Au Plan, 2011). Morocco's labour market is strongly influenced by the informal economy. In 2009, approximately 41 per cent of the economically active population was employed in agricultural and other primary industries, 37 per cent in services and 22 per cent in manufacturing and construction (Haut-Commissariat Au Plan, 2011). Moroccan SMEs are a big part of the economy. They represent about 95 per cent of enterprises, provide 50 per cent of private sectors jobs and make up 31 per cent of exporting firms (Benson and Arkoubi, 2006).

The unemployment rate fell from 9.8 per cent in 2009 to 9 per cent in the third quarter of 2010 (see table 2 for Morocco's and MENA's economic and employment indicators). Guaranteed minimum wages in the industrial and agricultural sectors are raised in Morocco on an irregular basis. There is a mismatch between curricula and the job market which undermines the quality of workers' output and Morocco's competitiveness (Oxford Business Group, 2009). Illiteracy rates are high, at about 40 per cent, which makes upgrading the skills of the workforce challenging. Entry level wages are usually lower in the private sector, but increase almost twice as fast compared to public sector employment (Boudarbat, 2008). Many Moroccans also work in Europe and the Middle East, especially in the agricultural, hospitality and information technology sectors.

Urban unemployment is particularly high among young educated workers. Unemployment among Moroccan youth between the ages of 15–24 and 25–34 with at least a secondary diploma is about 58.9 per cent and 40.4 per cent respectively (Boudarbat, 2008; Haut-Commissariat Au Plan, 2011). Educated workers only seek employment in the formal economy, prefer public sector employment and decline employment opportunities in the informal economy or may report themselves as unemployed if they take informal jobs (Boudarbat, 2008). Moreover, educated workers infrequently transition between different forms of employment and between sectors, especially due to the lack of job transition mechanisms, cultural expectations, perceptions about job stability, and information asymmetry (Benson and Arkoubi, 2006; Boudarbat, 2008). Whether highly educated or not, Moroccan temporary workers are more mobile, open to different employment contracts and more able to move between sectors (Bottini and Gasiorek, 2009) than permanent workers or unemployed women and men. Permanent workers are almost 80 per cent of total employment in most sectors in Morocco (Bottini and Gasiorek, 2009). In some sectors such as tourism, temporary workers are at least 50 per cent of the workforce. Recent economic liberalization and privatization policies are generating more temporary jobs, especially in exporting firms, which usually hire more females and have a flexible workforce.

The job-creating industries are agriculture, information technology, call centers, tourism, construction, and manufacturing. The offshore-services sector employs about 3,000 people in Morocco and is projected to add an additional 5,000 jobs in 2011 (Emploi-Maroc, 2010a). The call center industry is growing rapidly and attracts young educated workers. The industry has over 250 specialized companies which employ more than 30,000 people (Wa Bayn, 2009). In addition, the tourism sector is projected to create over 600,000 jobs due to the Government's newly adopted strategies (Emploi-Maroc, 2010b). Construction is also a large employment sector that is growing steadily at about 9.3 per cent, but suffers a shortage of skilled labour. Moreover, the Government is repositioning its automotive industry from servicing the domestic market to exporting globally. Morocco's annual production volume is projected to reach 100,000 vehicles in 2012 for both local and export markets and create 40,000 new jobs by 2015.

Table 2. Global PrEAs in MENA

	World	MENA	Morocco
GDP (current US\$ billion) ^a	\$61,351	\$2,140	\$89
GDP growth (annual %) ^a	2%	6%	6%
GDP per capita (current US\$, thousands) ^a	\$9	\$7	\$3
Foreign direct investment, net (balance of payments, current US\$ billion)	(\$224)	\$55	\$2
Population (total, millions) ^a	6,698	370	32
Labour force, total (millions) ^a	3,132	130	12
Unemployment, total (% of total labour force) ^b	4.3%	10.6%	9.6%
Youth unemployment, total (% of total labour force ages 15–24) ^b	12.0%	23.3%	19%
Youth employment to population ratio (ages 15–24, total, %) ^b	45%	29%	35%
Adult literacy rate (% of people ages 15 and above) ^c	83%	75%	56%
Youth literacy rate (% of people ages 15–24) ^c	89%	90%	77%

Source: ^a World Bank Development Indicators (WDI) 2008; ^b WDI, ILO 2008; ^c WDI and UNESCO 2008.

PrEAs in Morocco

Morocco is the largest market in North Africa for PrEAs. Communication, oversight and implementation of labour market legislation are really needed to manage labour market flexibility (Belhrach, 2011). The Government estimates that there are about 1,200 private employment agencies operating in Morocco. Some firms in Morocco are undergoing geographic, process and product upgrading. They are expanding within Morocco and Tunisia; improving processes through regulation and service level agreements; and offer multiple products within temporary staffing and HR consulting segments. Leading firms are generalists and service multiple sectors in the formal economy.

The top global firms in Morocco are Manpower, Adecco, Crit, and RMO Maroc. They have several offices across Morocco, are actively promoting industry regulation and are members in the *Association des Entreprises de Travail Temporaire Transparentes et Organisées* (AETTTO), and *Fédération Nationale des Entreprises de Travail Temporaire* (FNETT). These firms are gaining strong regional experience and have quickly expanded to Tunisia.

Local employment agencies also emerged in Morocco in the 1990s. Leading local firms include Tectra, Artus and Diorh (Belhrach, 2011; Boustani, 2011). These firms offer consulting HR services, HR surveys, temporary placement and temporary employment contracts. Leading firms are usually ISO 9001 certified, have several offices across Morocco and are in Tunisia. Other agencies are small local SMEs, often lack transparency and are not necessarily compliant with the labour code (Belhrach, 2011).

There are also several online recruitment portals in Morocco. Their services include job posting, job market news and recruitment related information. The leading online employment websites are Rekrute.com, Bayt.com³ and Amaljob.com.

³ Bayt.com is a web portal covering jobs in all countries of the Middle East.

Supporting institutions

The Moroccan *Ministère de l'Emploi et de la Formation Professionnelle* is the regulating body for all labour-related policies and activities in Morocco. The *Direction de l'Emploi* within the ministry coordinates employment activities including private employment agencies. The ministry is planning to train a number of inspectors to oversee the implementation and compliance of private employment agencies.

The *Agence Nationale de la Promotion de l'Emploi et des Compétences* (ANAPEC) is a public employment agency that was modeled after the French *Agence nationale pour l'emploi* (ANPE). The agency is responsible for collecting and managing job market information; maintains a database of candidates and vacancies; provides career guidance to jobseekers; assists young entrepreneurs with business plans; assists employers with filling vacancies; offers employment contracts; and implements training programmes. ANAPEC has agreements with professional associations and a network of about 24 organizations assist it with service delivery (ANAPEC, 2011). The agency is not viewed by PrEAs as a collaborative counterpart but more as a public sector competitor (Belahrach, 2011).

There are two main associations and one federation that represent private employment agencies: the *Association des Entreprises de Travail Temporaire Transparentes et Organisées* (AETTTO), the *Union Marocaine des Entreprises de Travail Temporaire* (UMETT) and the *Fédération Nationale des Entreprises de Travail Temporaire* (FNETT). AETTTO was established by six temporary employment agencies to support the momentum created by the new Labour Code and promote transparent operation of temporary agency work (AETTTO, 2007). Jamal Belahrach, Manpower's North Africa Director, is the president of AETTTO and has been active in promoting youth employment, industry regulation and better working conditions for workers. AETTTO has about ten members including Manpower Maroc, Adecco Maroc, Crit, and Artus Interim Maroc. The association collaborates with the Government and other organizations to improve the enforcement of regulation, create a code of conduct for the industry and develop monitoring and evaluation tools to measure the economic and social impacts of temporary work.

UMETT was established in 1996 to organize activity in the sector. The organization is estimated to have less than ten members including Best Profile, Adia Morocco, UGS Morocco, Intérim Express, Pro Interim, RMO, Armoni, and Multitech Morocco (Arif, 1997). The association has been promoting changes in the size of financial bond required of PrEAS.

FNETT was newly established in 2008. The federation is intended to oversee temporary work compliance and clarify responsibilities in the triangular relationship of temporary work. One of the primary goals of the organization is to standardize practices to establish a "gold standard" for agency work in Morocco. FNETT is Chaired by Jamal Belahrach and has 21 members. FNETT member agencies are estimated to employ 300 permanent workers and 15,000 temporary workers (Siraj, 2008).

Restrictions on temporary employment

In 2004, the Moroccan Government updated its labour code, *Code du Travail*, to make the labour market more flexible and to comply with international Conventions ratified by Morocco. Nevertheless, the new labour legislation is still restrictive. For example, section 500 of the labour code limits the duration of a temporary assignment to six months non-renewable or three months, renewable once (*Ministère de l'Emploi et de la Formation Professionnelle*, 2011). In addition, private employment agencies are required to post an annual financial bond that is equivalent to 50 times the value of the annual

minimum wage (article 482(f) the labour code) with the *Caisse de Dépôt et de Gestion* (CDG) (*Ministère de l'Emploi et de la Formation Professionnelle*, 2011). This labour code has been inapplicable, limits the number of temporary agencies that formally operate in (or enter) the sector and impacts the cash flow of PrEAs. There are only 12 companies out of 1,200 operating companies in the sector that have paid the guarantee, which makes 98 per cent of companies operating in the sector non-compliant (Belahrach, 2011; Boudarbat, 2008; *Ministère de l'Emploi et de la Formation Professionnelle*, 2011). The Ministry of Employment has prepared two draft amendments to the labour code that would increase the duration of temporary assignments to 12 months (or perhaps longer) and replace the bond deposit by a bank guarantee (*Ministère de l'Emploi et de la Formation Professionnelle*, 2011).

Women and youth employment

Leading firms have strict guidelines and policies that are transparent and non-discriminatory in recruitment, selection and placement, training and employee wages (Belahrach, 2011; Boustani, 2011). Firms focus on matching the job with candidates who possess the skills. Temporary workers in these agencies are skilled and educated. They usually have at least a two-year technical degree or a bachelor's degree (Belahrach, 2011; Boustani, 2011). Priority is given to candidates who possess good soft skills, such as communication, customer service and management competencies (Boustani, 2011).

Adecco's Tunisian expatriation programme for young graduates

"Adecco has received the first licence to manage the emigration of young graduates from Tunisia to Europe. France and Tunisia signed a service agreement in 2007 for 75 trades that could eventually involve a total of 7,000 workers per year. A contract of expatriation – official term – is a six-month fixed-term contracts for a client business through Adecco, that includes housing and training. The programme should enable young Tunisian graduates, including engineers, to complete their training abroad, and then bring new skills to Tunisia."

Source: Laporte, 2011.

Women working in temporary employment are mostly in administrative positions such as marketing, recruitment and secretarial positions. Young workers are usually employed in technical positions and in manufacturing. The youth face a number of obstacles in finding work due to skills mismatch and cultural misperceptions. For example, many Moroccan youth believe that if they personally know the hiring manager then they will be hired regardless of their skills (Belahrach, 2011). Private employment agencies are working with young workers to raise their awareness about finding work, are working with public institutions on skills development and are creating programmes to help place graduates with companies.

Some global PrEAs operating in Morocco and Tunisia are tapping into talent immigration from North Africa to GCC and European countries. Young professionals are recruited and placed on fixed-term expatriation contracts in IT, engineering, finance and hospitality positions. Talent immigration is growing, but could create "brain-drain" problems in the future (Belahrach, 2011).

Entrepreneurship, Job Creation and Twenty-first Century Skill Development in Middle East and North Africa Roundtable

Manpower is participating in developing path ways to make existing employment models more relevant and stem the tide of millions of youth in the Arab World leaving school and university without employable skills through better education.

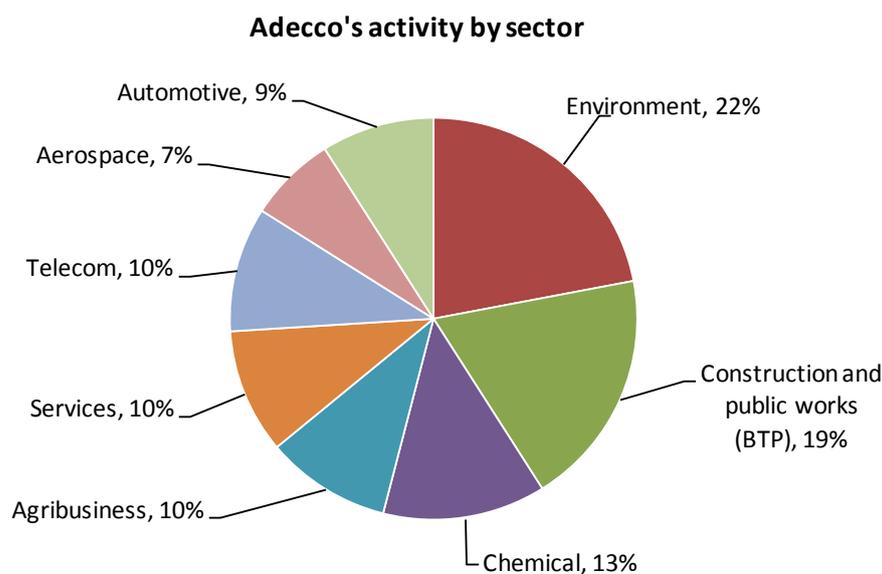
Source: Belahrach, 2011.

Leading firms in Morocco

Adecco Maroc

Adecco was the first global agency to enter Morocco in 1991. The company has six offices in Morocco and a staff of 60 permanent employees (Boustani, 2011). Adecco has over 3,500 temporary employees per day, working with 150 client companies. Almost 60 per cent of Adecco's placements are in administrative jobs ranging from entry-level receptionists to more experienced positions. Professional placements in call centres are a fast-growing segment of the business. The company is increasingly placing professionals in middle management, executive and engineering positions. Adecco is beginning to place more blue-collar workers in the manufacturing sector, especially automotive (see figure 2). The company also places workers in the hotels and hospitality sector in receptionist, housekeeping and foodservice positions. Adecco Maroc has collaborative agreements with higher education institutes such as *Institut Polytechnique* in Casablanca for training and placement of candidates. The company has also signed an agreement with training provider GNARUS to offer the Adecco–GNARUS Employment Grant to assist students with job market information and connect them with prospective employers (Adecco, 2011).

Figure 4. Adecco Maroc employment sectors



Source: Adecco, 2011.

Manpower Maroc

Manpower Maroc was established in 1997 and has nine branches across Morocco. The company has 350 clients, a staff of 100 permanent employees and about 5,000 temporary workers (Belahrach, 2011). Manpower Maroc is partnering with public and private institutions to provide them with labour market information and to promote regulation. In 2007, the company trained 1,500 workers on health and safety standards and over 700 young graduates on skills such as research, finance and sales (Manpower, 2011). Manpower Maroc is SA 8000 and ISO 9001 certified (Manpower, 2011).

The company recently opened Manpower Professional, to offer specialized recruitment services to experienced jobseekers and degree-level professionals. The company is also connecting its candidates in Morocco with professional employment

opportunities in other countries. In addition, Manpower is in the process of developing industry-specific products such as vendor-on-site management programmes to service fast-growing industries such as call centres.

Manpower Maroc drives upgrading in working conditions in hospitality

Tourism is a big employment sector. Many sector firms do not labour regulation, offer low wages and have poor working conditions. Manpower Maroc is partnering with companies and workers to increase employment opportunities while improving working. In 2010, Manpower started working with Accor Sofitel to improve working conditions and raise wages. Manpower then started working with other global hotels' chains to supply them with labour and assisted them to raise wages and upgrade working conditions.

Source: Belahrach, 2011.

Crit Maroc

Groupe Crit opened its Morocco office in 2003. By 2008, Crit had network of seven agencies that employed more than 2,500 temporary workers and placed over 500 executives and professionals. Crit Morocco has a staff of 35 permanent employees and specializes in engineering and technical positions (Crit, 2011). In 2008, Crit entered the Tunisian market to service French companies that were expanding at a very high rate (about one new company every five days) (Groupe Crit, 2009). In 2009, Crit's Swiss operations in Morocco and Tunisia recorded 68 per cent growth (Groupe Crit, 2009).

Analysis and recommendations

Morocco's PrEAs were established in the 1990s. The industry is still quite new and is underdeveloped. Manpower Maroc is taking the lead and working with the Government to establish industry standards and improve regulation. Moreover, the agency started an industry association, AETTTO, and a federation, FNETT, to improve coordination between agencies and promote industry standards, transparency and regulation. Manpower Maroc's industry leadership resulted in Morocco's ratification of ILO Convention No. 181 and the ongoing review of Morocco's labour code. The leading firms are involved in improving youth employment opportunities by providing job market intelligence to the Government, training and education institutions, jobseekers and employers. Some firms have collaborative agreements with technical schools to help identify job opportunities for new graduates.

In spite of this, the industry is quite fragmented and is not well coordinated. Membership in the leading associations is quite low, as the industry is not yet well organized. There is a big gap between global and local leading firms and the rest of the industry's agencies. Leading firms are usually ISO 9001 certified, compliant and differentiate themselves by product offerings, transparency, standard of services, and sectoral and geographical coverage. The majority of PrEAs however, are small SMEs that are not transparent and not compliant.

Coordination between firms and the Government is low and is very limited to a few of the leading firms. ANAPEC, the public employment agency, is viewed by the leading firms as a rival agency and not very effective (Belahrach, 2011). Even though Morocco revised its labour code in 2004, regulation is still quite strict and limits the duration of temporary work assignments, the ability of firms to change staffing levels according to market conditions and the financial capacity of PrEAs to comply with regulation. The Government does not have a monitoring and evaluation system, nor a rating mechanism to collect information and evaluate PrEAs' activities and operations in place. There is neither oversight nor public communication about poor industry performers, industry standards

and the best agencies to work with. Table 3 provides an overall rating of the private employment agency industry in Morocco.

Table 3. Morocco's PrEAs industry analysis indicators

Indicator	Institutional commitment	Industry coordination	Regulation	Monitoring and evaluation	Rating PrEAs	Communications and transparency
Excellent	Good	Fair	Poor			

Recommendations

There are several steps that the Moroccan Government, non-governmental organizations (NGOs), trade unions, and the private sector may wish to take to accelerate the growth of the industry and have a greater impact on job creation. The framework for these steps is already provided in many of the ILO Conventions and Recommendations. For example, the Employment Relationship Recommendation, 2006 (No. 198) suggests the creation of appropriate mechanisms that include representative public and private organizations to monitor labour market developments and promote collaboration between labour market actors. Also, the Employment Service Convention, 1948 (No. 88), Article 11, stipulates that the competent authorities shall take the necessary measures to secure effective cooperation between the public employment service and private employment agencies. Therefore, some of the steps that Government and other organizations may want to take include (see table 4):

- Continue to improve labour regulation to be more compatible with international standards and a flexible labour market.
- Create a steering committee to dialogue with private sector employers, PrEAs, trade unions and independent NGOs to set up the following:
 - gold standards for industry operations;
 - monitoring and evaluation standards;
 - data collection and industry oversight mechanisms to collect and broadcast information on agency work in Morocco, to ensure respect for workers' rights, and to track compliance; and
 - develop a registry and a rating system for all operating PrEAs in Morocco.
- Establish a website and develop communication material to inform jobseekers and employers about agency work in Morocco.

Table 4. Recommendations matrix

Indicator	Institutional commitment	Regulation	Industry coordination	Monitoring and evaluation	Rating PrEAs	Communications and transparency
Recommendation	Enhance dialogue and improve regulation	Improve labour code	Steering committee	Steering committee partners with stakeholders to register agencies and develop a rating system	Steering committee partners with stakeholders to register agencies and develop a rating system	Establish a web site and develop public communication materials and channels to raise awareness about agency work

Conclusion

Private employment agencies are critical to labour market efficiency. Global PrEAs started geographically expanding about 50 years ago. The Middle East market is a new market for these agencies and is undeveloped compared to developed economies. Global PrEAs in the Middle East have established offices in GCC countries, in Morocco and Tunisia and are partnering with organizations to tackle youth unemployment and skills development issues.

Morocco's experience with global PrEAs demonstrates their importance in developing the labour market, upgrading skills and driving better regulation. Manpower Maroc helped the Moroccan Government ratify the ILO Convention No. 181 and is working with the Tunisian authorities to ratify in due course as well. Global PrEAs often promote industry regulation and standards to improve labour market flexibility. Manpower Maroc is trying to organize stakeholders to drive transparency, standards and monitoring and evaluation. Some PrEAs in Morocco proved to be partners in addressing youth unemployment in the country.

However, many PrEAs in Morocco are not transparent. The Moroccan Government could consider taking steps to address some of the structural problems in the industry and capitalize on the presence of mature firms such as Manpower and Adecco in its market. The Government could improve regulation and create mechanisms that promote industry oversight, communication and collaboration to promote industry growth and raise awareness about industry actors in Morocco.”

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