

# YouGov<sup>®</sup> Sport

## Morocco

Sustainability in the sports, events and tourism industries in Morocco



MOROCCO

# Key Areas of Exploration

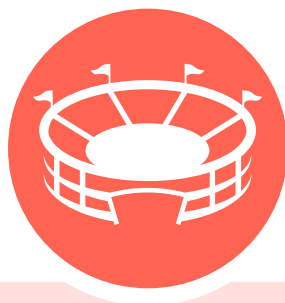


Josoor Institute commissioned YouGov Sport to understand sustainability and its positioning within the sports, events and tourism industry in Morocco.

This report will focus on these 3 key areas of exploration.



Sustainability and its position  
in Morocco



Sports, events & tourism  
in Morocco



Sustainability within sports,  
events & tourism

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# Methodology

Research for this project was conducted in 2020 and in 2 phases:

## IN DEPTH INTERVIEWS

- > Face to Face/Telephone interviews sports and events industry executives
- > Interview length 15 minutes
- > 8 Industry professionals interviewed in Morocco

## DESK RESEARCH

- > Supporting data for the report will be provided by desk research
- > All sources for the desk research will be credible and verifiable

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# Morocco Country Overview

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# Morocco

Morocco is located in the West of the Maghreb, on the North African coast and is largely viewed as the gateway to the continent; The Straits of Gibraltar separating it from Spain. Whilst Rabat is the capital, Casablanca is the most populous city; host to the main sea port it is also considered to be the country's economic and commercial centre. The country is 64% urbanised.

## COUNTRY INFORMATION

Size	0.7M sq. km.
Population	35.6 million
Capital	Rabat
Other major cities	Marrakesh, Fes, Casablanca, Tangier
Languages	Arabic, French
Currency	Moroccan Dirham (Pegged to USD at \$0.1)
Borders	Algeria, Western Sahara

Source: Desk Research, Statista, World Population Review



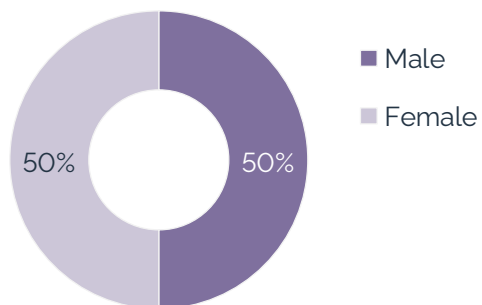


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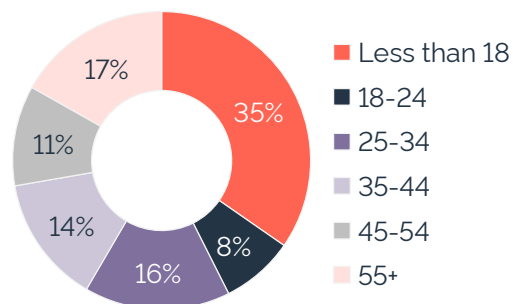
# Its people

More than 70% of Morocco's population is under 45 with nationals making up almost the entirety. The employment rate has been falling over the last decade as the market faces 3 main challenges: low quality jobs and opportunity growth, in addition to a low inclusion rate amongst women and youth.

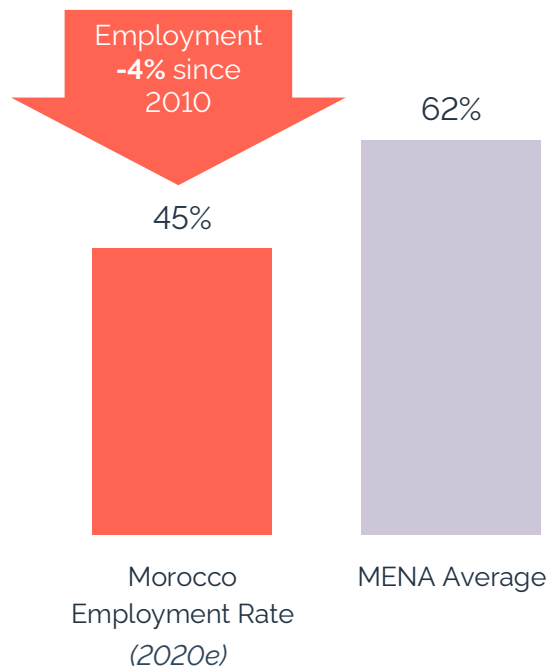
## GENDER



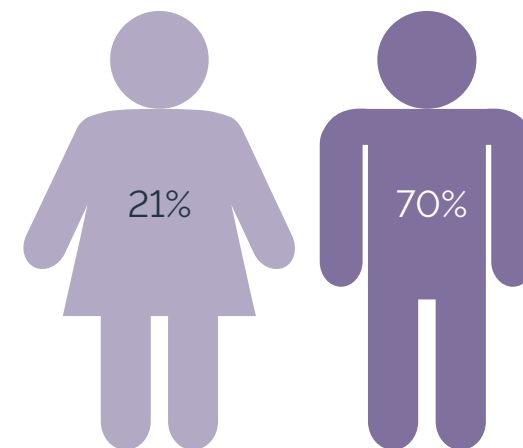
## AGE



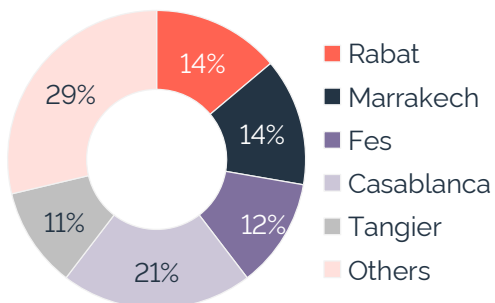
## EMPLOYMENT 2019



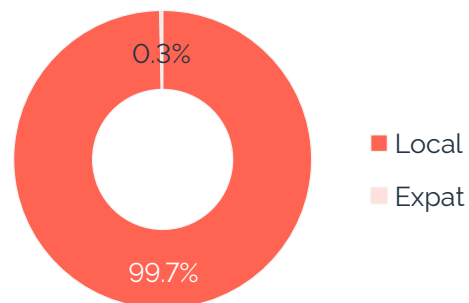
## % OF WOMEN/MEN IN WORKFORCE



## LOCATION



## NATIONALITY

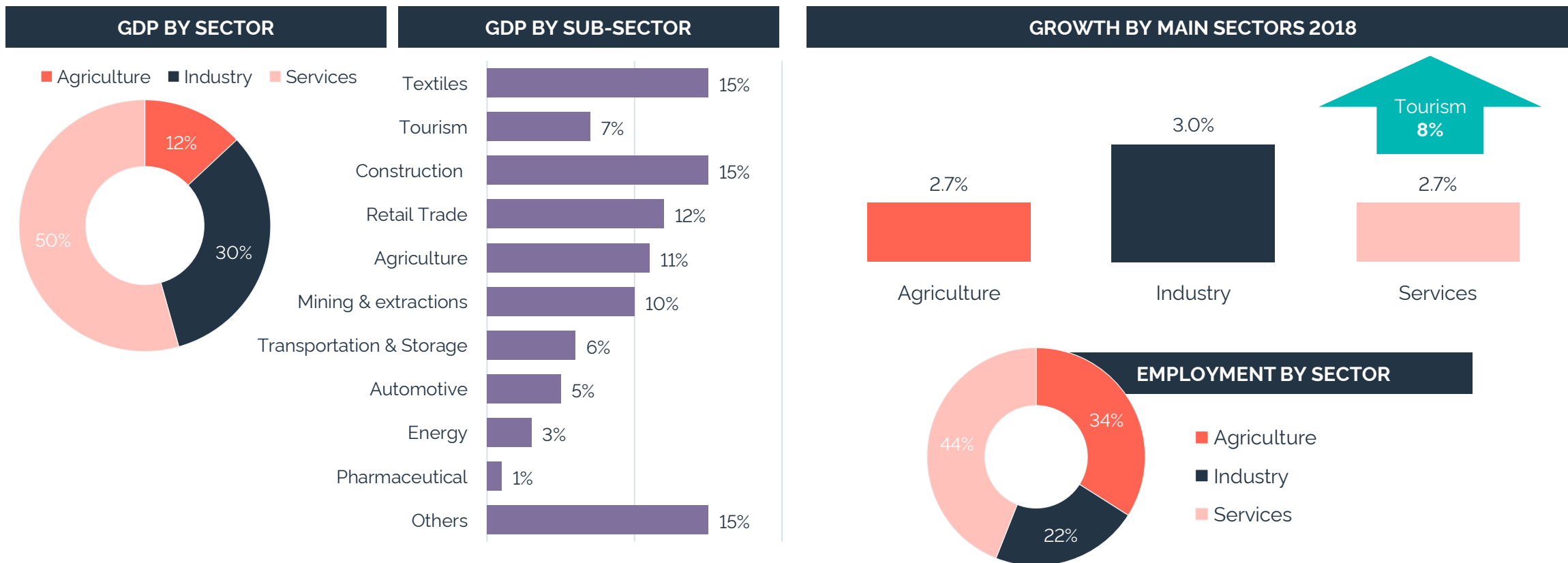


Source: Desk Research, YouGov Panel, The Global Economy, World Bank.

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# Economy

Morocco has a diversified economy where its proximity to Europe has enabled a cost effective automotive and textiles sector to thrive, with exports representing 88% of GDP. This trade is therefore heavily dependent on the European market, primarily Spain and France. Tourism has also prospered and is the key growth driver within the services sector.



Source: YouGov Sport, Desk Research, World Bank

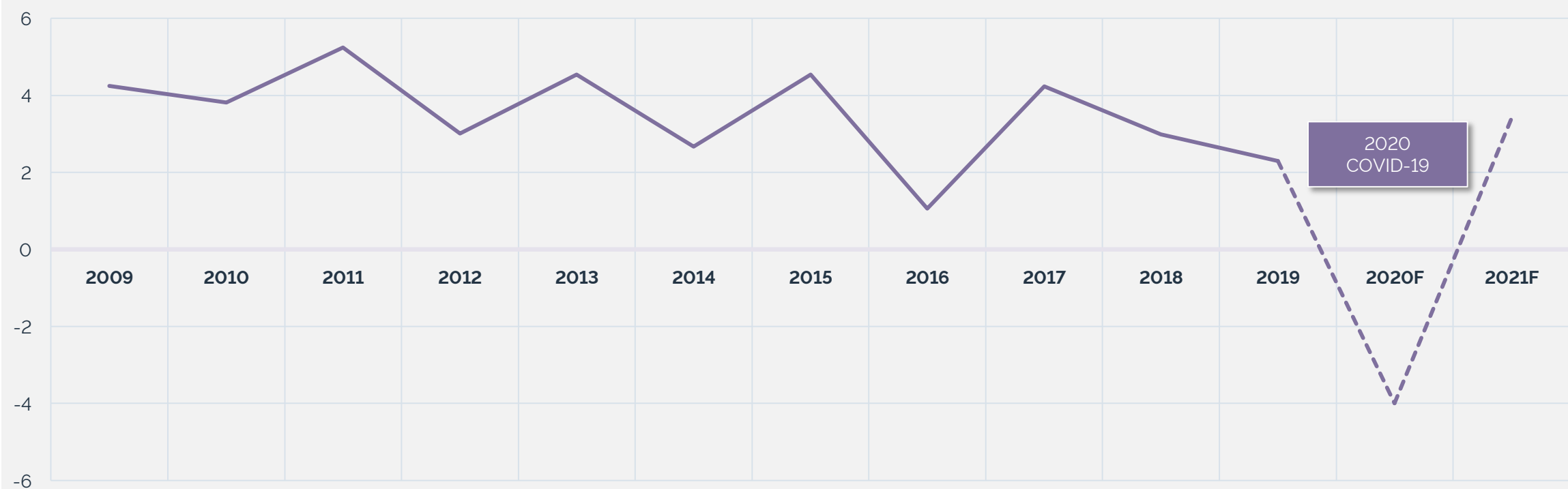


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# Outlook

Morocco's economy has maintained stable growth over the past decade. However, some slow down has been experienced since 2014 which can be attributed to a volatile agricultural sector combined with slow growth in tertiary industries. 2020 will no doubt prove challenging due to COVID-19, however like most economies this is projected to bounce back in 2021.

## GDP GROWTH



Source: Desk Research, World Bank, Nordea Trade

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# Sustainability in Morocco

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From inception in 1992, Morocco has embarked on a country development strategy for growth. Based on 5 pillars and facing some fundamental challenges, this programme evolved through 3 phases:

**The National Sustainable Development Strategy** had to meet the principles of international and legal compliance and commitment to all relevant stakeholders

### MOROCCO'S DEVELOPMENT STRATEGY

#### 5 PILLARS

SUSTAINABLE  
DEVELOPMENT

ENVIRONMENT

ECONOMY

SOCIAL

GOVERNANCE

#### 3 PHRASES

**PHASE I**  
Social & economic reform  
(1992 – 2000)

- › Economic liberalisation,
- › Promotion of key industries for export
- › Social projects to generate isolated rural areas
- › Fiscal reforms

**PHASE II**  
Implementing the basics and  
accelerating development  
(2000 – 2011)

- › Acceleration of institutional and legal reforms dealing with the social sector and reform of the family
- › Targeted sector investments for accelerated growth
- › International trade agreements
- › Establishment of the first green environmental laws

**PHASE III**  
Democratic achievement  
& the implementation of  
sustainable development as a  
societal project  
(2011)

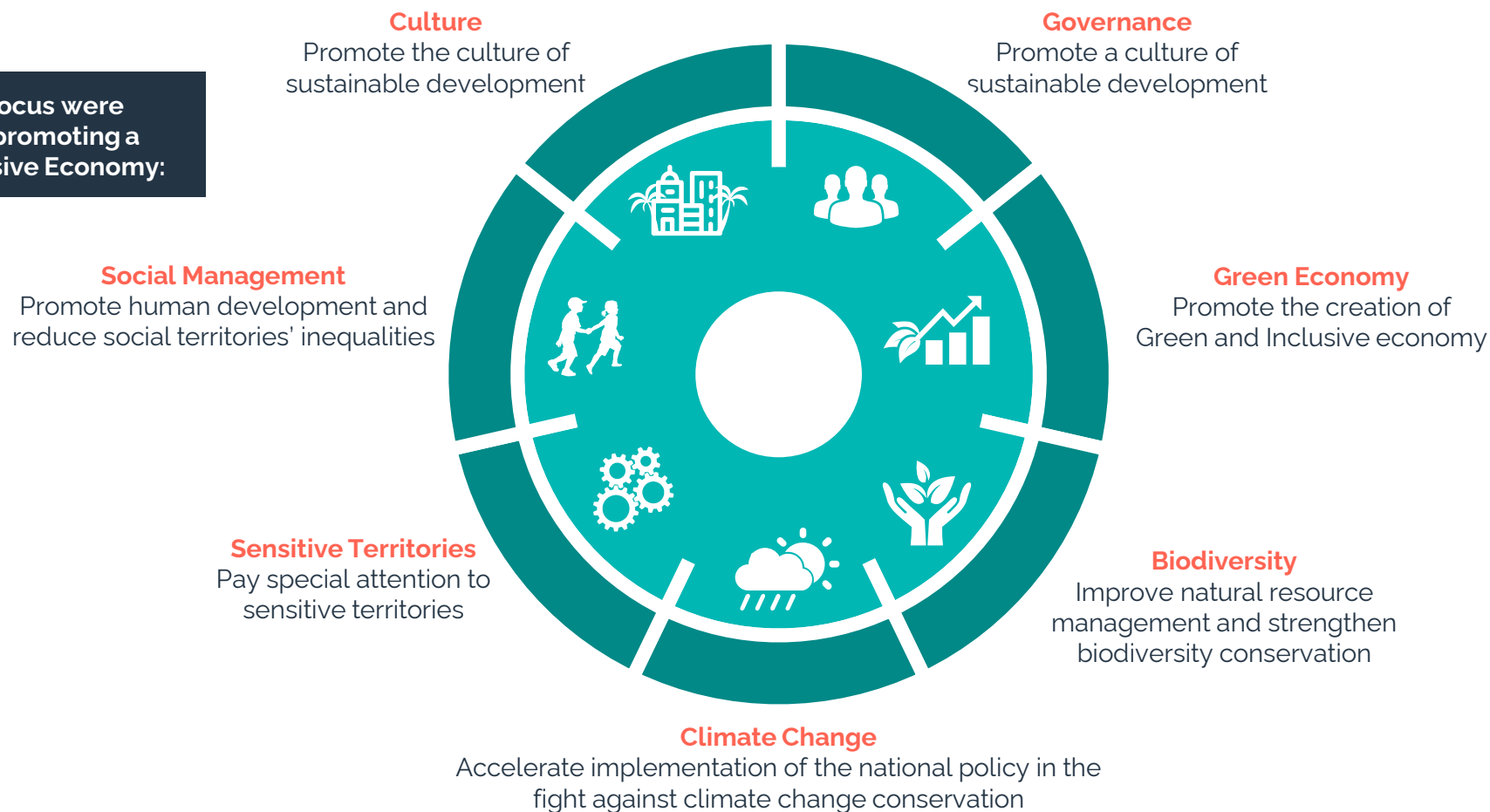
- › 2011 – Establishment of the National Charter on Environmental and Sustainable Development.
- › 2014 – Establishment of the National Charter on the Environment and Sustainable Development
- › **2015 – Adoption of the National Sustainable Development Strategy**

Source: Desk Research, National Sustainable Development Strategy (NSDS), Morocco

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Whilst 'a green and inclusive economy' formed a pillar within the National Sustainable Development Strategy, it was recognised that it should act as a reinforcing lever, rather than a driver for economic and social development.

7 areas of focus were devised for promoting a Green & Inclusive Economy:



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Tourism is a key sector and national priority for Morocco. As such, the Ministry of Tourism created Vision 2020; a model for driving growth through sustainable tourism.



Source: Desk Research, Moroccan Ministry of Tourism

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The UN is working with local Moroccan partners across the Sustainable Development Goals. Particular focus is being aimed to add value and support towards national efforts:

### Mapping could look like this\*

Inclusion & reduction of socio-economic & gender inequalities	
SDG #	Goal
1	No Poverty
2	Zero Hunger
3	Good Health & Well-being
4	Quality Education
5	Gender Equality
6	Clean Water & Sanitation
7	Affordable & Clean Energy
10	Reduced Inequalities

Quality education & Health	
SDG #	Goal
1	No Poverty
2	Zero Hunger
3	Good Health & Well-being
4	Quality Education

Democratic governance & advanced regionalisation	
SDG #	Goal
3	Good health & well-being
5	Gender equality
16	Peace, Justice and Strong Institutions



Clean Production & Consumption	
SDG #	Goal
6	Clean Water & Sanitation
7	Affordable and Clean Energy
9	Industry, Innovation & Infrastructure
11	Sustainable Cities & Communities
12	Responsible Consumption & Production
13	Climate Action

Empowerment of women & youth	
SDG #	Goal
3	Good Health & Well-being
4	Quality Education
5	Gender Equality
10	Reduced Inequalities

Source: Desk Research, Sustainabledevelopment.org \* Mapping exercise by YouGov Sport

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## SELECTED PROJECT

With a view to achieving 42% of its energy targets through renewables by 2020, Morocco has constructed several solar energy parks. The largest of which is the **Noor Ouarzazate Solar Complex**, which until 2020 was disputably the world's largest.

**Concentrated Solar Power – An uncommon method**

Unlike conventional solar panels which work on photovoltaic cells, this site uses 2 million curved mirrors to concentrate sun's radiation to heat tubes of melt salt which is pumped to a power unit to produce electricity.

- > The whole complex provides 580 megawatts of electricity, enough power for a city double the size of Marrakech
- > Currently saving the planet from over 760,000 tons of carbon emissions annually
- > The project created 2,000 jobs during construction and 500 jobs directly for operations / maintenance
- > Reduces the burden of imported energy (almost 90%) from the government's budget; so that it can focus on other sectors like education, healthcare and social welfare

Noor Ouarzazate Solar Complex



Source: Desk Research, CNN



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**Industry professionals' awareness:**

Moroccan industry professionals interviewed all had a good understanding on sustainability.

"To me, on the subject of sustainability in Morocco, it is to meet the needs without compromising the capabilities of the future generation, and it is also a responsible business management approach. And there must be a positive impact for the company because it has a great role to influence the society and the surrounding environment."

*Sport Club*

"For me regarding the issue of sustainability in Morocco, I think that with regard to our events after being recognized internationally and responding to many demands, including sustainability. It plays an environmentally important role as it works to reduce carbon emissions as well as climatic fluctuations and economically reduces the financial cost of any project if it is used properly."

*Major Events*

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# Sport and events in Morocco

3

## MOROCCO

Morocco hosts a variety of both local and international events. Notably, the country is bidding for the 6<sup>th</sup> time to host the FIFA World Cup, for 2030.

Moroccan Football League – Botola



Marathon de Sables



Formula E – Marrakech e-Prix



Grand Prix Hassan II – ATP 250



2019 African Games



WeCasablanca – Casablanca Marathon



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Along with traditionally popular sports, Morocco also places an emphasis on endurance events like marathons, cycling and long-distance swimming

SELECTED SPORT EVENTS				
Event	Sport	City	Local / International / Global	Numbers
<b>WeCasablanca – Casablanca Marathon</b>	Marathon	Casablanca	International	15,000 (participants)
<b>Marrakech Marathon</b>	Marathon	Marrakech	International	9,000 (participants)
<b>Marathon des Sables</b>	Ultramarathon	Ouarzazate	Global	1,200 (participants)
<b>Moroccan professional football league – Botola</b>	Football	Multiple cities	Local	
<b>PGA Tour – Morocco</b>	Golf	Marrakech	Global	
<b>Morocco Open – WTA</b>	Tennis	Rabat	Global	
<b>Grand Prix Hassan II – ATP 250</b>	Tennis	Casablanca	Global	
<b>Formula E Marrakesh ePrix</b>	Motorsports	Marrakech	Global	
<b>2019 African Games</b>	Football	Multiple cities	International	
<b>Fes international Marathon</b>	Marathon	Fes	International	
<b>L'Etape by Tour de France</b>	Cycling	Marrakech	International	
<b>Morocco Swim Trek</b>	Swimming	Dakhla	International	
<b>World Touring Car Cup Race of Morocco</b>	Motorsports	Marrakech	International	

Source: YouGov Sport, Desk Research, event websites

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Music dominates the events scene in Morocco, with a mixture of both local and international festivals hosted throughout the country.

SELECTED LEISURE EVENTS			
Event	City	Local / International / Global	Attendance
Gnaoua World Music Festival	Essaouira	International	500,000
Timitar Festival	Agadir	International	500,000
Kalaat Mgouna – Rose Festival	Kalaat Mgouna	Local	300,000
Mawazine	Rabat	International	220,000
Merzouga International Festival of World Music	Merzouga	International	20,000
Marrakech International Film Festival	Marrakech	International	
Fes World Sacred Music Festival	Fes	International	
Fez Sufi Culture Festival	Fes	Local	
Marrakesh Popular Arts Festival	Marrakech	Local	
Marrakech Biennale	Marrakech	International	
Atlas Electronic Music	Marrakech	International	

Source: YouGov Sport, Desk Research, event websites

## MOROCCO

Football is easily the most popular sport in Morocco and the majority of large arenas are dedicated to hosting. Little publicised information on sustainability features.

SELECTED VENUES				
Venue	City	Capacity	Built in	Main event
Grand Stade de Casablanca	Casablanca	93,000	2025 expected	
Stade Moulay Abdellah	Rabat	53,000	1983	Football – National Team
Stade Adrar	Agadir	45,480	2013	Football – Morocco Premier League
Stade Mohammed V	Casablanca	45,000	1955	Football – Morocco Premier League
Complexe Sportif	Fes	45,000	2003	Football – Morocco Premier League
Stade Ibn Batouta	Tangier	45,000	2011	Football – Morocco Premier League
Grand Stade de Marrakech	Marrakech	41,356	2011	Football – Morocco Premier League
Stade d'Honneur	Meknes	25,000		Football – Morocco Premier League
Stade El Harti	Marrakech	20,000		Football – Morocco Premier League
Stade Larbi Ben Mbarek	Casablanca	20,000		Football – Morocco Premier League
Stade d'Honneur	Oujda	19,000	1977	Football – Morocco Premier League
Stade Saniat Rmel	Tétouan	15,000	1913	Football – Morocco Premier League
Stade Municipal	Kénitra	15,000	1941	Football – Morocco Premier League

Source: YouGov Sport, Desk Research, Worldstadiums.com



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Around 4 in 10 of the larger venues in Morocco are more than 30 years old.

SELECTED VENUES				
Venue	City	Capacity	Built in	Main event
Stade d'Honneur	Beni Mellal	12,000		Football – Morocco Premier League
Stade Mimoun Al Arsi	Al Hoceima	12,000		Football – Morocco Premier League
Salle Mohamed V	Casablanca	12,000	1981	Indoor sports
Stade Abdelkader Allam	Sidi Kacem	12,000		Football – Morocco Premier League
Salle Moulay Abdellah	Rabat	11,000	1983	Basketball
Stade Municipal	Bensaleh	10,000		Football – Morocco Premier League
Stade Municipal	Berkane	10,000	2014	Football – Morocco Premier League
Stade Sheikh M. Laghdaf	Laâyoune	10,000		Football – Morocco Premier League
Stade d'Honneur	Settat	10,000		Football – Morocco Premier League
CIA Moulay El Hassan	Marrakech	10,000		Football – Morocco Premier League
Stade Boubker Ammar	Salé	10,000		Football – Morocco Premier League
Stade du 20 Août	Khémisset	10,000		Football – Morocco Premier League
Stade du Phosphate	Khouribga	10,000		Football – Morocco Premier League

Source: YouGov Sport, Desk Research, Worldstadiums.com



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Venues catering for leisure events and sports other than football tend to be more modern/recently built.

SELECTED VENUES				
Venue	City	Capacity	Built in	Main event
Circuit International Moulay El Hassan	Marrakech	10,000	2009	Formula, World Touring
Rabat Grand Theatre	Rabat	9,000	2021 expected	Concerts
Complexe Al Amal	Casablanca	5,500		ATP – Tennis
Municipal stadium of Ait Melloul	Ait Melloul	5,000		Football – Morocco Premier League
National Cricket Stadium	Tangier	5,000	2002	Cricket
Grand Theatre of Casablanca	Casablanca	1,800	2009	Concerts
Samanah Golf Club	Marrakech		2009	PGA Morocco Champions Golf
Salle Ibn Yassine	Rabat			Volleyball
Modern Art Center of Tetouan	Tetouan		1918	Arts

Source: YouGov Sport, Desk Research, event sites

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# Sustainability in sport and events in Morocco

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## MOROCCO

## SELECTED PROJECT

**Sustainability is the guiding theme of Vision 2020.** Tourism in Morocco, however, is largely concentrated in areas that do not lend themselves to this; coast and cities. Despite this, Morocco has many areas of natural resource and beauty where luxury eco-tourism is developing. One of the most prominent examples of this is the Kasbah du Toubkal mountain retreat

## Accreditations include:

- > **2008:** Moroccan Sustainable Tourism Award winners
- > **2008:** National Geographic Adventure magazine – *Top 50 Eco-Lodges*
- > **2009:** Eco Hotels of the World – 4 Green Stars
- > **2012:** The Green Key Morocco

### Sustainable tourism and authentic Berber hospitality on Northern Africa's highest peak.

- > While the resort itself was built using sustainable development techniques like local materials, no air conditioning, moderate use of electricity, it serves a higher purpose of supporting the local community by charging a 5% community development charge on invoices
- > From the 5% levy, the village has built a much-needed rubbish disposal system, and composting and recycling as much as possible. Since 2009, it has supported a rubbish collection truck to replace mules
- > Healthcare of the surrounding village has also improved by providing an ambulance for ferrying patients to the nearby hospital in time which saves lives
- > The 5% levy also helps improve local education levels by construction and running of a free school
- > The village association has planted trees, reinforced flood protection for the village and improved biodiversity and animal welfare in the region
- > Job creation for locals

Source: Desk Research, CNN

Kasbah du Toubkal, Toubkal National Park



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**The GEO Foundation** is the international not-for-profit dedicated organisation to helping golf deliver and be recognised for a positive impact for people and nature.

Programmes connect the efforts and knowledge of the global golf community and recognize those who are a part of the sport's sustainability movement:

## OnCourse programme

## OnCourse Facilities

Online programme to help clubs get more from sustainability

## OnCourse Tournaments

guidance, mentoring and communications for golf tournaments

## OnCourse Developments

Guidance and mentoring with credible assurance for golf developments



Fostering Nature



Supporting Communities



Conserving Resources

## Supporting Partners



Source: Desk Research, SustainableGolf

## MOROCCO

## SELECTED PROJECT

5 golf courses in Morocco across Marrakech, Casablanca and Agadir are planning to gain the GEO sustainability accreditation; a reflection of the concerted effort of the country to embrace sustainability across both tourism and sport.

### OnCourse® programme for GEO certification

**The Golf clubs participating in the OnCourse® programme for GEO are committed to continual improvements in the important sustainability areas of Nature, Resources, and Community.**

- > GEO organization helps the venue attain certification through training programmes on tweaks to be done to the course
- > GEO organization helps the venue attain certification through training programmes on tweaks to be done to the course
- > The current situation is analysed with the help of GEO to create a baseline of sustainability data
- > The changes are suggested based on the local resources and international best practices
- > An app allows the venue to track its progress on implementation
- > Once changes are done, the venue can apply for sustainability certificate from GEO

### 5 golf courses in Morocco

Assoufid Golf Club



Casa Green Golf Club



Golf de Mogador



Palm Golf Marrakech



Tazegzout



Source: Desk Research, CNN, SustainableGolf

## M O R O C C O

**Leading by sustainable example :**

From large, global events to smaller, local ones, industry professionals are well versed in how sustainability is being applied within sports.

"I think that we are the leaders in the field of applying sustainability in the Marrakech International Race, and we were able to obtain the ISO certificate. And with regard to our demonstrations, especially from an economic point of view, I think that the energy cost has been saved for motor racing. We relied on solar energy as a source of electric energy to supply the arenas with this energy and there was a saving for this cost.

Solar energy/sustainability = cost savings."

*Major Events*

"Globally, there is the German football championship, and they are trying to deliver multiple messages about sustainability to the public as well as the use of electronic cards. In Morocco, if we reach this level it will be a great achievement."

*Sport Governing Body*

"FIFA applies sustainability well because it works to renew its goals and products'."

*Sport Governing Body*

"In Morocco, in the horse show, horse manure is used to generate electric power, so a company has been contracted to acquire 130 horses. Manure will be used to generate energy for its provision."

*Sport Club*

"The American Football Association organized the initiative in 2014 and among its goals is to develop the concept of sustainability and was From the ocean to all parts of Florida, it is very large and has a large population. This initiative included raising awareness about all environmentally destructive practices in this region and about the atmosphere of Florida, as well as activities in beach cleaning for local residents or tourists, as well as an initiative to reduce food waste and recycle it.

There is also the European Football Association, which took care of the issue of sustainability through the fans that flock to European competitions such as the Champions League or the European Cup, it is in the tens of thousands and thus produce a huge amount of carbon dioxide.

There are also the Olympic Games, which were postponed to the year 2021, the Tokyo Olympics, and the organizers will use wood made from local sources in Japan to build the athletes' village. As well as the use of hydrogen fuel cells for energy and the use of recycled water. Even the medals that were distributed are then recycled at 100% of homemade materials from telephones, old computers, as well as other electronic waste, as well as the European Cup of Nations, which was supposed to be this year. Road congestion and the large number of tickets studied this topic."

*Sport Club*



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### Sustainable initiatives in practice:

A range of initiatives are being deployed across the sports and events industry – sustainability is a high profile country ambition.

"Yes. There are measures for sustainability. Because it is considered a general trend for Morocco, where there are a group of projects related to solar energy, as well as to wind power. Also the sports field and the evidence is that we were able to organize COP 22 and we are considered the first African country to have organized it and it is a great achievement as it is a large forum that Morocco could embrace and evidence of its application of the concept of sustainability."

*Authority / Council / Ministry*

#### Single-use plastics – common quote

"I do not have a preconceived idea about this subject, at the local level I do not think but for the Gulf States could have been applied to this subject."

*Authority / Council / Ministry*

"We have made the decision to form a committee responsible for the issue of sustainability and to take care of everything related to recycling and waste minimization."

*Sport Club*



"There are sustainability measures in all of our projects. We try to apply it as much as possible, for example, trying to replace entry cards to the game with electronic ones. Try to stay away from using the leaves because it is harmful to the environment. Carrying out a workshop to collect the plastic water bottles that were used and we partnered with a company that recycled these bottles."

*Sport Governing Body*

> Recycled plastic solutions are being deployed, whilst single-use plastic is not a topic that generates much awareness

"Cars used by the masses to travel between the corners of the large space in the ring are cars that run on electric energy. As well as with regard to waste, we deal with it in a special way, as there is a partnership agreement with a private institution for recycling waste and reusing it in other industries, as well as using waste water or airport water that we use to irrigate green spaces as well as accessories in our arena. We use solar energy to supply the field installations, and provide Electrical power teams. We do special sessions directed at different age groups, especially in the category of children, as well as awareness-raising courses about the importance of sustainability for future generations."

*Major Events*



## MOROCCO

**Importance of sustainability:**

The field of sport is viewed by industry professionals as being a key platform from which to spread awareness around sustainability, which is considered high importance for current and future generations.

"It is very important, because the goal of sport is to create a culture to implement the concept of sustainability and through the activities that we do we work to make this mission a success. And we must apply this concept in this field, as well as our activities are based on encouraging youth as well as networking the office."

*Sport League*

"I think it is very important, especially in sporting events, as it is an opportunity to communicate with the masses, and it tries to perpetuate a culture of sustainability and consolidate it within society, in order to educate people about the importance of sustainability towards their environment or towards future generations. And in the sports field, it is the main supporter of the organizing bodies as well as the group keen to make sporting events a success in all its manifestations."

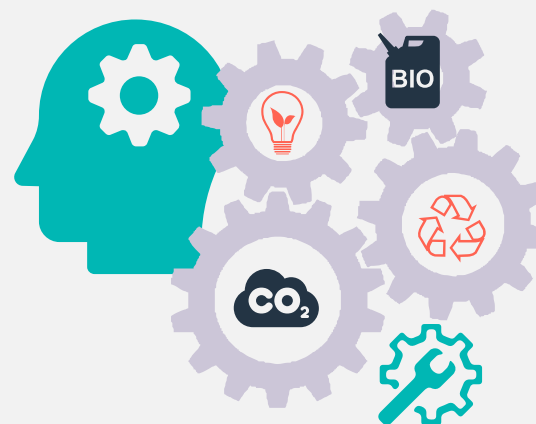
*Major Events*

"For me, I think it is very important because sport of all kinds attracts a lot of people and you have to educate the public and the citizens that they are dedicated to the concept of sustainability and it becomes within their daily lives."

*Sport Club*

"For me, I think it is very important because sustainability has an important role.....on the social level, we are talking about ending suffering from poverty and hunger, as well as studying better standards for education and health because they are important sectors that all governments and countries around the world are interest in. At the same time, creating job opportunities as well as the environmental aspect that defines some climatic changes, pollution and other environmental factors that are considered to be health."

*Sport Club*



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## Relevance of event size:

In general, industry professionals believe that the larger the event, the greater the need will be for sustainable initiatives; mainly to limit the harmful impact of activities,

"I do not think that the size of the event is important because it is local, regional or international. This local event may be a platform for communication with the masses and we will communicate the idea of the importance of sustainability in our daily lives. I suspect that the size of the event is not a factor in adopting sustainability measures because it should be applied in all circumstances."

*Major Events*

"For me the size of the event is very important. I suspect that if the event is small, you will not be able to implement sustainability and it will not have a great reputation. But if the event is big, it needs several measures related to sustainability, to a greater financial cost, and to more training."

*Sport Governing Body*

"The size of the event is very important in determining the importance of sustainability measures, because more the event is large, more the task will be difficult."

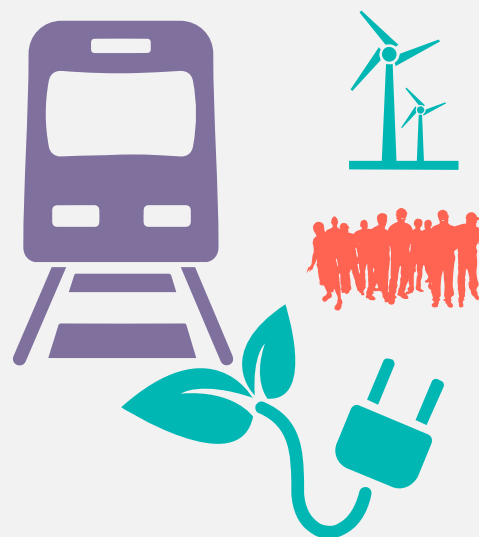
*Sport Governing Body*

"The size of the event is very important in determining the importance of sustainability measures, because the activities differ from one to the other.

There are local and international events, so sustainability measures increase with the size of the event.

For example, local federations do not deal with sustainability as necessary, unlike sporting competitions globally."

*Sport Club*



- > Some acknowledgement of the need for sustainability to be applied across all events, irrelevant of size – cost and training being challenges

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## Accreditation and measurement:

Whilst not universal, knowledge of ISO 20121 is known amongst Moroccan industry professionals. Measurement is sought, with some weighting to differing country situations.

- > Arguments against measurement are more a concern around differences between country needs

### ACCREDITATION

"It is a standard responsible for activities and their organization. And how to implement them at the local or international level, for example, the Olympic Games, and it reduces negative damage to the environment and undertakes tribal measures. And its goal is to leave a positive impact after every major demonstration at the economic, environmental and human levels."

*Sport Club*

"Of course, as for our demonstration, it is true, and it is the main condition for organizing our events. It is considered an international standard for sustainable development, and it helps institutions implement the sustainability standards and provide their conditions."

*Major Events*

### MEASUREMENT

"Sustainability practices must be measured by carrying out in-depth studies in order to know how to manage them, and the culture of sustainability in Morocco has begun to develop and we must give the torch to professionals because they have experience in this field. Actors in this field must be involved."

*Sport League*

"It is not important to measure sustainability practices because there are different criteria between regions, but we must focus on the way in which it was engaged in this issue,...

Of course, in order to be successful, there must be human as well as material efforts, and I think that experts in this field can measure sustainability."

*Sport Governing Body*

"Yes, sustainability practices must be measured by conducting in-depth studies in order to know how to manage it...there are criteria that can be used to measure sustainability, urban development, environmental development and urban planning."

*Tourism Governing Body*

"There must be a difference in standards from one country to another because there is a difference from one region to another, as well as the way of life, traditions, economic level, as well as the human factor."

*Major Events*

## MOROCCO

### Challenges:

A very clear focus for sustainability in Morocco is the workforce – awareness and training. For the most part, this is considered achievable.



"We must focus on the workforce. And the human factor, and also when the event is large, it has an impact on the environment, where efforts must be made to implement the concept of sustainability."

*Sport Governing Body*

"I think the difficulty lies in the logistical side, as well as the awareness side. Ease of application remains how the skills are developed."

*Sport Governing Body*

"I think Morocco is interested in the environmental field, when we talk about a club in Oued Zem we find it difficult to find local actors in this field."

*Sport League*

"We must focus on the human factor because it is the basis for success. And we must provide all the conditions of work, as well as the financial aspect must be available. Focus on continuous training and development."

*Authority / Council / Ministry*

"The human factor must be focused on because it is important in production as well as the available physical capabilities...it must focus on the workforce and its role in production as well as services and tasks related to each person, and how to meet the necessary needs."

*Tourism Governing Body*

"You must focus on the workforce. And the human factor, and also when the event is large, it has an impact on the ocean, where greater efforts must be made to implement the concept of sustainability."

*Sport League*



> Technological operators in the country appear to be a challenge

MOROCCO

# Conclusions

5

## MOROCCO

# Nudge, push or pull?



"It must focus on the economic factor and how to finance these activities well and provide the regulatory bodies with the means of work that respect the environment.

Likewise, we must focus on the human factor as it is the engine and the basis in every change and in every success and carry out continuous activities and continuous training in order to sense the importance of preserving the environment and how to use it well."

*Sport Governing Body*

## MOROCCO

## Conclusions

**Sustainability is integrated within Morocco's country strategy and industry professionals are well versed in how it will be positioned for future growth.**

- > High levels of awareness and knowledge of all aspects of sustainability and its application both locally and internationally within industry.
- > Sustainable solutions such as solar and electric energy, waste management and paperless operations are being established
- Single-use plastic is not only a challenge for implementation, there appears to be little to no awareness on the topic
  - *Recycling solutions are however on the agenda*
- > Agreed by all that sports plays a central role in creating awareness for sustainability
  - *Sustainability is on the country agenda and raising awareness via high profile events is considered a win-win (planet and country)*

## Recommendations

**As tourism (in all its forms) is a key sector for Morocco, this will be a key stage from which the country can promote.**

- > Tourism, sports and events are all recognised platforms for informing and educating the population on sustainability
  - *As a recognised key driver of growth, this is an area of opportunity for job creation and upskilling of the working population*
  - *Events and destinations must promote their sustainable credentials to attract the eco-conscious traveller*
  - *As a destination, Morocco is well placed to develop across sports, events and tourism and should actively seek out combined opportunities to attract visitors*
- > Facilities and venues to be updated (or sustainable features promoted)
- > There needs to be State funding and guidance on how to make this commercially attractive and viable
  - *This includes job creation and support*



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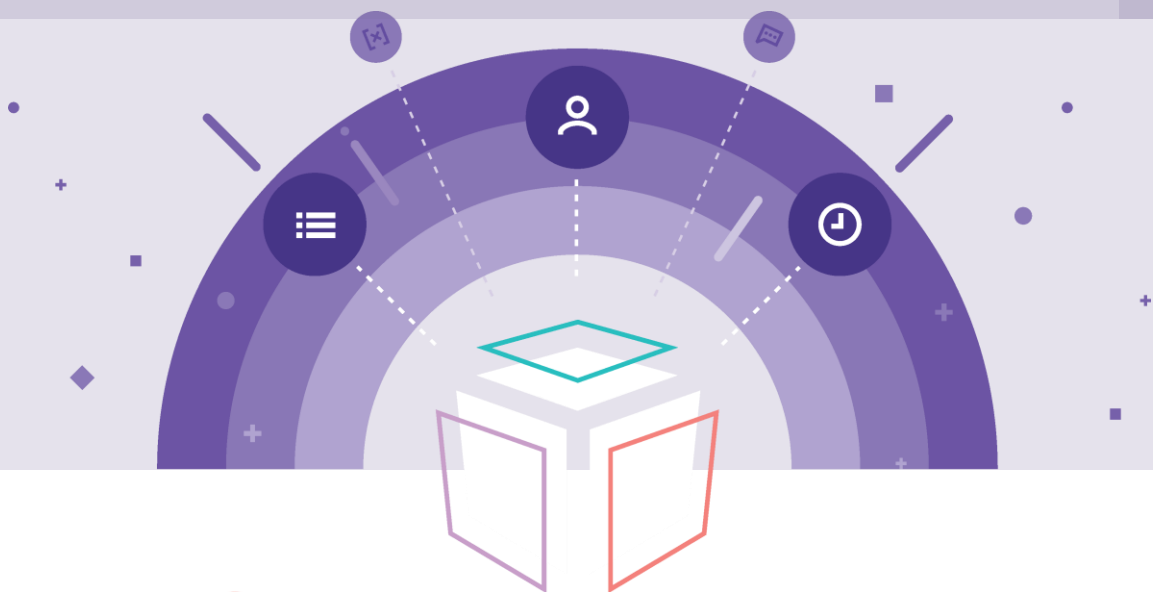
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