

Culture & Economic Performance



What strategies for  
sustainable employment and urban  
development planning ?

**Case study : Casablanca**

## Preface

Casablanca, a Moroccan city with over 3 million inhabitants and the most important city of the Maghreb, is a town with an historical culture. Around the ancient Medina, a new town, structured and modern, has rapidly sprung up to respond to the demographic development which the town has undergone during the second half of the Twentieth Century. Since independence in 1956, Casablanca has rapidly established its claim to be the economic capital of the kingdom and has been at the hub of development throughout the country, producing 50% of added value for Morocco and attracting 48% of investment. Today the city must face the challenges of globalisation and international competition.

Despite very marked social disparities and economic weakness, Casablanca's economic dynamism enables it to become increasingly attractive not only to tourists, but also to foreign investors.

Development strategies based on culture are a very recent thing in Casablanca. The royal involvement in large investment projects and the support of cultural projects is a real opportunity for the development of the city and, in more general terms, for the modernisation of the country. Amidst huge urban redefinition projects, Casablanca bases its cultural strategy on two historic pillars: heritage and cinema. The city's objective is to be an essential destination on the tourist map while at the same time achieving a standard of life of the level of western capitals.

The architectural heritage of the Nineteenth and Twentieth Centuries has of late been considered an attraction and is included in an urbanisation project in the interests of social cohesion and the development of cultural tourism. The present challenge is its restoration and its showcasing as a place distinct from the other Moroccan towns, which are known mainly in architectural terms for their medinas (Marrakech, Rabat, Fez). These strategies are still at an early stage and it is not therefore possible to draw conclusions on the basis of the first results which have been obtained.

The cinema is also an essential economic development axis for the metropolis and has received strong encouragement in the form of government support (help for local productions and the attracting of foreign productions). One development strategy is the provision of artistic training so as to create a qualified local work force. This option is already resulting in the creation of many jobs and impressive financial returns.

## Strengths/Weaknesses/Opportunities/Threats in Casablanca

<b>Strengths</b>	<b>Weaknesses</b>
<ul style="list-style-type: none"> <li>▪ <i>Rich architectural heritage of 19<sup>th</sup> and 20<sup>th</sup> Centuries</i></li> <li>▪ <i>Desegregation, blending of cultures, complementarity of tradition and modernism, making Casablanca a place for experimentation and innovation</i></li> <li>▪ <i>Strong economic dynamism</i></li> </ul>	<ul style="list-style-type: none"> <li>▪ <i>Very blatant social disparities</i></li> <li>▪ <i>Economic fragility (persistent rate of unemployment, rate of growth one of the weakest in Morocco)</i></li> <li>▪ <i>Shortage of qualified local manpower (particularly in terms of architecture and cinema)</i></li> <li>▪ <i>Very high rate of illiteracy in Morocco</i></li> </ul>
<b>Opportunities</b>	<b>Threats</b>
<ul style="list-style-type: none"> <li>▪ <i>Setting up of major infrastructure projects</i></li> <li>▪ <i>Political awareness of the importance of the major investment, modernisation and investment projects which translates into an involvement of the monarchy in those topics</i></li> <li>▪ <i>Support of France in numerous partnership projects between French and Moroccan schools</i></li> <li>▪ <i>Enhancement of the appeal of Morocco as a destination (among foreign investors and tourists)</i></li> <li>▪ <i>Strong potential of economic development in cinema and architecture sectors</i></li> </ul>	<ul style="list-style-type: none"> <li>▪ <i>Fierce competition with other Moroccan towns (Marrakech, Rabat)</i></li> <li>▪ <i>Development of the city at two speeds (luxury and squalor)</i></li> <li>▪ <i>Modernisation of country difficult (social and political conservatism)</i></li> <li>▪ <i>Difficulty in mobilising finance in order to fund cultural projects</i></li> <li>▪ <i>Lack of international awareness of the cinema sector</i></li> </ul>

Casablanca's identity card	
Population	<ul style="list-style-type: none"> <li>▶ <b>City of Casablanca:</b> 3 269 962 inhabitants (1<sup>st</sup> city of the Maghreb)</li> <li>▶ <b>Region of Greater Casablanca:</b> 3 900 000 inhabitants (largest agglomeration in the country)</li> <li>▶ <b>Young population:</b> 1/3 under 15 years (region)</li> </ul>
Surface area	<ul style="list-style-type: none"> <li>▶ <b>City of Casablanca:</b> 323 km<sup>2</sup></li> <li>▶ <b>Greater Casablanca</b> spreads over 873 km<sup>2</sup>, with a shoreline of over 50 km</li> </ul>
Economic dynamic	<ul style="list-style-type: none"> <li>▶ The economic capital of Morocco since 1880: at the end of the 19<sup>th</sup> Century, Casablanca represented a compulsory port of call for European powers. Its population has grown from about 6 000 inhabitants (1865) to 20 000 at the beginning of the 20<sup>th</sup> century</li> <li>▶ <b>The economic capital of Morocco:</b> it produces <b>50% of the added value of Morocco</b> and attracts <b>48% of investments</b></li> <li>▶ <b>Strong economic activity:</b> <ul style="list-style-type: none"> <li>▪ Primary sector for creation of national wealth between 2000 and 2007 (18.8%)</li> <li>▪ Primary port zone of Morocco with 60% of commercial transactions</li> <li>▪ Primary industrial centre with over a third of the industrial establishments of the country</li> <li>▪ Primary financial centre with 30% of the banking network and almost all the head offices of banks and insurance companies</li> <li>▪ Primary contributor to employment creation, with over 46% of the active population of Morocco (active population of Casablanca: 63.5%)</li> <li>▪ 1<sup>st</sup> in North Africa for business building stock, with over 1 400 000 m<sup>2</sup> of office space</li> <li>▪ a GNP per inhabitant of 25 918 Dirhams (2 320 Euros)</li> </ul> </li> <li>▶ Economic activity <b>dominated by the tertiary sector</b> (49.6% of jobs), followed by the secondary sector (40.5%): <ul style="list-style-type: none"> <li>▪ <b>job losses</b> in the textile and clothing sectors, transport, warehousing and communication and food industries</li> <li>▪ <b>job creation</b> in the building industry, in the banking, insurance and property industries and in the residential services industry</li> </ul> </li> <li>▶ <b>Economic difficulties remain:</b> <ul style="list-style-type: none"> <li>▪ persistent unemployment which is reducing slowly: <b>3<sup>rd</sup> most affected region in Morocco</b> (12%)</li> <li>▪ <b>rate of growth among the lowest</b> of the Moroccan regions between 2000 and 2007: 5.5 %</li> <li>▪ <b>trading deficits</b></li> <li>▪ <b>textile sector in difficulty</b> (leading employment sector): lost 15% of its share in the European market (competition from China)</li> </ul> </li> <li>▶ <b>Highly attractive to foreign investors:</b> considerable <b>administrative, legal and fiscal advantages</b> making Casablanca one of the most sought-after regions of the world for developing an economic activity</li> <li>▶ <b>High stakes engendered by the economic development</b> of the country and its regionalisation (major role of Casablanca in this project): <ul style="list-style-type: none"> <li>▪ increase of the imbalances between regions in terms of the employment market and a rise in the phenomena of social exclusion</li> <li>▪ absence of any regional division which might constitute an incentive to the mobilisation of the population</li> <li>▪ deficit in the qualified workforce, with weakened financial resources</li> </ul> </li> </ul>
Tourist sector	<ul style="list-style-type: none"> <li>▶ <b>One of the main economic growth generators of Morocco (contribution to GNP: 8%)</b> <ul style="list-style-type: none"> <li>▪ <b>2<sup>nd</sup> source of currency</b> of the country, ranking after transfers of Moroccan residents abroad and ahead of phosphate sales (1<sup>st</sup> exporter).</li> <li>▪ <b>3<sup>rd</sup> tourist city</b> of Morocco after Marrakech and Agadir.</li> <li>▪ Annual increase of +7% in overnight stays between 2007 and 2008 (higher growth in Marrakech and Agadir). In 2007, 1<sup>st</sup> in terms of increase in the number of tourists (+9%), ahead of Fez (+7%) and Rabat (+6%). It is also the <b>1<sup>st</sup> destination for business tourism</b> in Morocco.</li> </ul> </li> <li>▶ <b>Specific strategy for boosting tourism where culture plays a major rôle 'Casablanca 2012: urbanism, culture, tourism and leisure activities'</b> <ul style="list-style-type: none"> <li>▪ Objective: to exceed <b>one million visitors a year</b></li> </ul> </li> </ul>

	<ul style="list-style-type: none"> <li>▪ <b>Financing: private sector</b> for 82% programmed work sites</li> <li>▪ <b>Pillar of this strategy: Casablanca Marina.</b> <ul style="list-style-type: none"> <li>- Complete upgrading of the coast with a new activity zone and an <b>integrated business centre, leisure centre</b> and residential centre (international standards)</li> <li>- Large scale project over 26 hectares (10 on land reclaimed from sea)</li> <li>- Total cost of over 450 million Euros</li> <li>- Expected returns: <b>25 000 jobs created</b> and over 3.5 million Euros in local tax paid to the Communes of Casablanca</li> </ul> </li> <li>▪ <b>Development of hotel accommodation:</b> reinforcement of hotel capacity since 2006, with an average creation of beds recorded every year (target of 230 000 beds in 2010, for 10 million tourists).</li> <li>▪ <b>Numerous development projects for entertainment and recreational spaces:</b> construction of an aquarium to international standards, development of the beaches and upgrading of the forests and leisure parks</li> <li>▪ <b>Urban regeneration of the city:</b> upgrading of the Arab League Park, improvement of Avenue des FAR, refurbishment of the Casa-port Railway Station...</li> </ul> <p>▶ <b>Development of transport:</b> an Urban Movement Plan is being finalised.</p>
Cultural sector	<p>▶ <b>Conservation and restoration of national heritage:</b> the rehabilitation of the ancient medina is one of the flagship projects for urban rehabilitation. The safeguarding and the showcasing of modern heritage (20<sup>th</sup> Century) have also become a major concern for the local authorities of Casablanca.</p> <p>▶ <b>Cinema:</b> Over the past few years, Morocco has become one of the most popular film making venues for international producers and directors: 17 feature films were made there in 2009 (including 4 in Casablanca). Casablanca boasts a large film studio, <i>Cinedina</i>, which extends over more than 7 hectares.</p> <p>▶ <b>The creation of Festivals</b> in all Moroccan towns is strongly encouraged and supported by King Mohammed VI (initiative launched and financed in all towns). The jobs associated with the creation of cultural entertainment have thus been strongly supported thanks to the injection of funds and a truly professional approach. Over the past 10 years, thousands of jobs have resulted from the growth of cultural entertainment in Morocco.</p>
Education	<p>▶ <b>Very high level of illiteracy</b> in Morocco: 38.1% for men and 63.9% for women (population of over 15 years old).</p> <p>▶ <b>Budget applied to education: 5% of GNP</b>, i.e. 1.3 billion Euros (2000).</p> <p>▶ Extensive innovation and scientific research, with over 20% of the national workforce of research academics, of which 60% are employed in science and engineering</p> <p>▶ <b>Greater Casablanca: largest university and educational centre of the Maghreb</b>, with over 27 000 young graduates per annum from the universities</p> <ul style="list-style-type: none"> <li>▪ 10 Faculties</li> <li>▪ 6 Engineering Academies and 1 Civil Aeronautic Meteorological Centre</li> <li>▪ Over 45 private establishments of higher education (including ten Higher Educational Establishments for Commerce and Management)</li> <li>▪ 80 professional training centres and institutes (including the first institute in Africa for Building and Civil Engineering)</li> <li>▪ Over 400 private centres and institutes of professional training</li> </ul>

Casablanca is an historic cultural city with a trump card up its sleeve: a large heritage of modern constructions to preserve and to cherish

- ▶ **Casablanca has made its mark as a laboratory of urban planning and architecture for nearly half a century**, from the start of the French Protectorate (1912) to Independence (1956). Dozens of French architects of the time made the city into an area for experimental designs which were often to serve as models in France and throughout the world.
- ▶ **At the beginning of the Twentieth Century Casablanca became a training ground for great French architects seeking innovation and modernity**
  - At the beginning of the 20<sup>th</sup> Century, architectural innovations were aimed at achieving an increasingly greater comfort, and buildings designed in Casa by French architects often outstrip those of Paris at the same period in terms of amenities.
  - Garages (Auto-Hall by Pierre Bousquet in 1930), cinemas (Rialto by Pierre Jabin in 1930 and Vox by Marius Boyer in 1935) and banking halls (Banque d'Etat by Edmond Brion in 1937) became monuments in a city which was lacking in such things. From the Thirties onwards (1931 was a record year for building) there was a trend towards verticality which outstripped that of the French capital.
- ▶ **This recently constructed heritage (as opposed to the ancient medina) constitutes a real asset for the metropolis**
  - This heritage has been acknowledged only recently as a development lever for cultural tourism. Political power has very recently opened up to culture, and in particular to the building heritage.
  - Within a context of strong national competition, Casablanca would like to stand apart from other towns with medinas classified as Unesco World Heritage sites. Morocco has, indeed, 8 sites listed as Unesco World Heritage sites, including the medinas of Essaouira, Fez and Tétouan.
  - A symbol of this wish to stand apart, the Hassan II Mosque was constructed partly on the sea between 1986 and 1993, under the supervision of a French architect, and spreads over 9 hectares. Its minaret, which is 200 m high, makes it the highest religious building in the world. It is the 3<sup>rd</sup> biggest mosque in the world after those of Mecca and Medina.
- ▶ **Conserving and cherishing this urban architectural heritage, largely unknown and undervalued, are challenges for the future**
  - After independence, commissions to foreign architects became rare to the point of virtually disappearing in the Seventies, with the limitations on the right to practise which were imposed on them. Since then, this unique 20<sup>th</sup> Century architectural heritage is fallen under threat.
  - Some buildings are falling into ruins, while others have been destroyed. The organisation *Casa Mémoire* was set up in 1995, to preserve and cherish this heritage of the colonial period before it falls prey to the building shortage and the pauperisation of the old centre. Casa Mémoire estimates that there are some 4 000 buildings in need of protection.

Casablanca is showing intense economic activity and is nowadays attracting investors from all over the world

- ▶ **Attracting foreign investment is at the heart of Morocco's economic strategy.** The country is linked by free trade agreements with several countries in the world, which should give investors, by 2013, access to a consumer market of close to a billion people.
- ▶ **The city holds great appeal for foreign investors, thanks to its strategic position and its sizeable economic activity:**
  - Casablanca ranks as the number one area for the creation of national wealth between 2000 and 2007 (18.8%) and as the number one contributor to the creation of employment in the country (over 46% of the active population of Morocco). The city is moreover the leading financial centre of North Africa, with a Stock Exchange which achieved a capitalisation of nearly 500 billion dirhams at the end of August 2007.
  - The city offers considerable administrative, legal and fiscal advantages, which make Casablanca one of the most sought-after regions in the world for developing an economic economy rapidly and with minimum risk.
  - Its position, at one at the same time at the gateway of Europe and in an African country, presents high potential and at minimum cost.

- ▶ **Since 2005, there has been a change in the structure of foreign investments in Morocco**, with the appearance of two major factors: the palpable fall in privatisation operations within the total volume of investments and the growing attraction of Morocco for investors coming from the Gulf States.
  - Operators from the United Arab Emirates head the list of international investors (18 billion dollars since the beginning of 2010). Those investments are mainly made in the sectors of tourism, property and infrastructures.
  - Direct foreign investment in Morocco experienced a reduction of 32.9% in the first quarter of 2009, in the wake of the world economic crisis.
- ▶ **The increased attraction of Morocco as an investment destination has also contributed, to a significant degree, to the influx of foreign capital**, through various factors which have increased the confidence which the country inspires among investors:
  - performances achieved in the matter of macroeconomic stabilisation and growth in the non agricultural GNP
  - the carrying out of major infrastructure projects
  - the improvement of the business climate, especially through the facilitation of Customs and administrative procedures and the reform of the system of the award of public contracts
  - Royal involvement in the major investment projects

The dilapidation and impoverishment of the ancient medina nevertheless reflect the extent of the social disparities and the economic fragility of the city

- ▶ **Casablanca is a city with a secular history, which today is an incarnation of all the paradoxes of modern Morocco**: it is a city where extreme wealth rubs shoulders with abject poverty.
- ▶ **The ancient medina, having suffered from a lack of investment for over 50 years, today shows an advanced state of dilapidation and poverty.**
  - The old town has about 47,000 inhabitants housed in buildings which in 80% of cases are over 50 years old. Some structures and infrastructures of the town are in a serious state of dilapidation, while the historic wall and gates are in such a state of decay as to require a rehabilitation and restructuring operation.
  - The medina consists of insanitary and under-equipped homes, the buildings of which threaten to fall into ruin. It is characterised by groups of shanty towns, a distinct lack of public and social equipment and a regression of its commercial activity.
  - Unemployment is rife in Casablanca (3<sup>rd</sup> most acutely affected region in Morocco, with 12% of active persons looking for jobs) and particularly affects these quarters.
  - This situation is complicated by the negative effects of poverty and social conditions of households on schooling and dropping out of school. The effects of the deficit in the basic infrastructures are reinforced by delinquency and violence.
- ▶ **The medina of Casablanca is also suffering from a lack of tourist and cultural animation**
  - Although the medina still contains some public and religious buildings the architecture of which dates back to the 18<sup>th</sup> Century, these are often in a state of decay and most of them have undergone major changes (increasing the height, dilapidation, ...).
  - As an historic commercial trading centre and in the absence of traditional souks, the medina of Casablanca was never a town of artisans. This would explain the absence of a middle class, which gives the medinas of Fez and Marrakech their prestige and sparkle.
  - The commercial and handicraft activities are progressively developing in the old centre, but they suffer the urban problems of insecurity and lack of hygiene.

The aim of the metropolis is to maintain its economic dynamics and to reinforce them through the setting up of structured and high added-value development projects at urban, social, cultural and tourist level

- ▶ **Today, several development opportunities are available at economic, social, urban, tourism and cultural level**
  - **The enhancement of the shoreline and establishment as a luxury tourist destination:** the Casablanca Marina is a development project which aims to place Casablanca among the leading cities. Its strategic position, between the sea and the town centre, together with its innovative concept will give a fresh boost to the tourist ranking of the town.
  - **The stimulus to the historic heart of the town, through the rehabilitation of the ancient medina:** closed off in relation to the rest of the city, the old town is the subject of an upgrading project which consists of the restoration of squares, roads and urban landmarks, together with the definition and planning of tourist circuits.
  - **The ease of movement, thanks to the drawing up of an Urban Movement Plan:** the latter is being finalised. It enables a detailed diagnostic to be compiled of current and future malfunctions and the identification of flow of traffic and the safety of users. The Tram project is also a strong axis of this transport development strategy. Finally, the strategy for the address system and road signing of the town has now been finalised. It will enable the introduction of a standard system for addresses and ensure a consistent and improved signposting of the town.
  - **The improvement of services related to the urban environment:** cleanliness, drainage, highways administration, green areas.
  - **The development of the innovation potential of the town, and in particular through the urban project Casa Shore Park:** an innovative concept of a technology park, its aims to provide over 30 000 jobs for the town and to give Casablanca the image of a modern town which is showing its capacity for innovation and raising itself up to the highest world standards in matters of technology.
- ▶ **Casablanca wishes to claim the position of the most westernised capital in the Middle East, in order to develop its potential.**
  - Casablanca is banking on a lifestyle similar to that of European capitals, in order to attract business and dynamic young executives from western countries.
  - Strength through its economic activity and numerous urban projects either initiated or in the planning stage, the town also performs well, by comparison to the national average, in terms of education, teaching and medical cover.

The rehabilitation project for the ancient medina is an urban project in the interests of social cohesion and the development of cultural tourism

- ▶ **The rehabilitation project for the ancient medina is aimed at social development through cultural development and the restoration of the town centre.** In the long term, the project aims at setting up clusters in the fields of craft, pictorial art (creation of galleries) and music.
- ▶ Many players are involved in this project:
  - **The Casablanca Medina is now the beneficiary of the royal initiative for the rehabilitation of the national heritage.** This support is vital and underlines the recent awareness of political authorities concerning the conservation of the national heritage. This dimension nowadays forms part and parcel of every urban project.
  - **Association Casablanca Carrières Centrales is the promoter of the medina rehabilitation project,** set up a few months ago.
  - **Piloted by the Prefecture of Casa-Anfa,** the project is being carried out in partnership with many other players, whether or not members (Casa Mémoire, AUC, UACP, Lydec, Civil Protection, the Department of the Environment).
- ▶ **The financing of this project has not yet been defined, and it will be necessary to involve elected councils, local authorities, Government departments and the private sector.** The budget for the carrying out of the first phase of this project has been estimated at 9.1 million Euros. To this must be added the cost of rehabilitating the Bab Marrakech market, estimated at 2.4 million Euros.
- ▶ **A diagnostic has been carried out; it resulted in a definition of the following considerations:**
  - Urban rehabilitation with its infrastructures: the making of an in-depth study of urban renewal over the entire territory of the ancient medina
  - Upgrading of tourism and culture
  - Re-skilling and modernisation in trade, craftsmanship and the service industries

- Social development of the neighbourhood
- ▶ The synthesis of these strategic considerations has made it clear that the actions for upgrading the ancient medina must be part of a **coordinated intervention between the various players** and, as it is based on the physical context of the people and their activities, a **good social cohesion, a durable development and good governance**.
- ▶ **A social approach is vital to the success of the project**, and it aims at establishing confidence and rallying local people to the project through actions of communication and solidarity during the month of Ramadan 2010. This approach also applies to the employment sector, with the creation of networks between the professionals in charge of the urban redefinition of the city. A recruitment agency is to be set up specifically for the medina, together with a training centre for the neighbouring areas (the marina dockyards will be required to give priority to job seekers from the medina).
- ▶ **Actions relating to all the constituent parts (social, economic, health, culture, safety and heritage) have been defined and prioritised:**
  - Priority actions: reinforcement of infrastructures and equipment, re-skilling, communication and sensitisation, improvement of hygiene and cleanliness conditions, development of cultural activities (shows and entertainments, setting up of a tourist circuit in the medina) and reinforcement of safety arrangements.
  - In due course: re-skilling in commerce, improvement of commercial attraction, upgrading of public equipment and setting up of campaigns to combat delinquency and illiteracy.

A development strategy for tourist appeal is also based on recent building heritage, with a view to making Casablanca an essential tourist destination on the Mediterranean tourist map.

- ▶ **Casablanca aims to promote the development of cultural tourism, so as to gain a place for the city as a leading cultural destination in the Mediterranean.** Historical studies and practical observations carried out in the Mediterranean regions reveal the existence of a common national heritage which sprung up as the result of the growth of the Southern Mediterranean between the 19<sup>th</sup> and 20<sup>th</sup> centuries.
- ▶ **The improvement and the spreading of an enhanced image of the urban architectural heritage among inhabitants and tourists** is one of the aims of the projects underway. This step will contribute to increasing the value of the building heritage of the city as a cultural and economic product.
- ▶ **The main aims of the project *Mutual Heritage* are:**
  - To set up a network of well-qualified professionals to mobilise and optimise skills and resources in partner countries
  - To improve competence in the protection of our heritage on the part of public and private operators (training, spreading of methodologies)
  - To improve capacities for managing this common heritage by promoting exchanges between non-commercial companies, professionals and administrations
  - To support educational events to integrate the architectural heritage within the teaching system
  - To promote the visibility, the sensitisation and ownership of the common heritage and to spread awareness of it using appropriate tools and public activities such as participation in conferences and in the media
- ▶ **This project has a major responsibility for the development of the visibility of the town internationally.** It also involves the preparation of the technical documents which will enable the Casablanca authorities to lodge an application with Unesco with a view to obtaining classification as a World Heritage Site for 19<sup>th</sup> and 20<sup>th</sup> century architecture.
- ▶ **Casablanca relies on the mobilisation of local players and the creation of networks at international level, and in particular with France, in order to carry out this project successfully**
  - The project consortium consists of the association Casa Mémoire in Casablanca, the National School of Architecture in Rabat, the Association for Safeguarding the Medina of Tunis and the NGO Riwaq for the safeguarding and development of Historic Buildings in Palestine.
  - It is also associated with Instituto de Cultura Mediterránea (Melilla), Shared Heritage (a previous experiment conducted by the European Union), the universities of Ferrare, Florence, Tizi-Ouzou and Vienna.
- ▶ **Over a period of three years (from March 2009 to February 2012), this project is being coordinated by the French laboratory CITERES** (Inter-disciplinary Centre "Cities, Territories, Environment and Societies") of the François-Rabelais University in Tours and 80% financed by the European Union (for a total budget of €1 609 363) within the scope of the regional programme *Euromed Heritage 4*.



### ► The project *Mutual Heritage* is at a relatively early stage of development

- The heritage inventory is the first stage to have been launched within the scope of a project concerning the city of Casablanca by the association Casa Mémoire. This inventory is occupying a team of 15 individuals, comprising a labour force brought in from Europe, due to a current lack of local skills.
- The members of *Mutual Heritage* organise specific training sessions, workshops and special initiatives, together with action days for the training of the various professionals and to sensitise the public. It is in particular planned to prepare a manual on tourism and heritage for professionals and municipal authorities .
- The project also envisages the editing of a series of publications concerning the new knowledge and experience feed-back. In addition, five exhibitions will enable a synthesising of the activities and the aims of the project and their presentation to the public at large.
- The first results of this project (Guide to the heritage of Casablanca, including an inventory of the buildings which should be protected) will be available at the end of the year 2010.

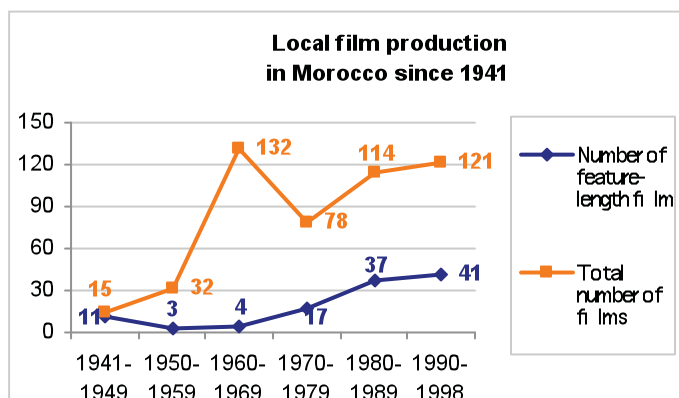
### ► The project demonstrates the lack of a skilled local workforce

- Training in the arts is still in its infancy in Morocco: the first Heritage architects trained in Morocco graduated in 2009, and were 12 in number. Access to higher education is reserved to the more privileged members of society (high tuition fees).
- Morocco is aware of the potential of the cultural sector and is aiming to increase the number and the quality of artistic training opportunities.

The development of the cinema is a strategic lever, the success of which rests on the specific advantages of the territory and specifically on its financial administrative and fiscal advantages

### ► Casablanca is a historic film-producing town, supported by national legislation and large sources of finance

- The cinema sector has been significantly developed in Morocco, which has historically hosted many foreign film productions, dating from the early days of the cinema industry: between 1911 and 1962, 210 feature films were made in the Maghreb (Morocco, Algeria and Tunisia).
- Dahir 1977 (Royal Decree) gave rise from January 1980 onwards to the creation of a support fund<sup>1</sup> for cinematographic production and exploitation (12 million dirhams in subsidies). This enabled national production to take off again. Between 1988 and 1993 an Aid Fund was also set up, representing 36.3 million dirhams in subsidies.



- In 2004, new legislation was passed with a view to granting further support to national production. This legislation placed particular emphasis on:
  - the grant of an advance on receipts before or after production
  - the financial contribution to script writing and re-writing
  - the granting of a premium based on film quality
  - the holding of three annual sessions of the Aid Commission instead of two

### ► Since independence, the Moroccan Government has invested in this sector through the CCM (Moroccan Cinematographic Centre), formed in January 1944, and through the training of cinema directors in European cinema institutes

- Nowadays the components of Moroccan cinematographic production are fiction films, promotional films and local and foreign production.
- Casablanca boasts a large film studio, *Cinedina*. It extends over more than seven hectares and is host to largely foreign productions, television programmes and promotional spots.

<sup>1</sup> The Aid Fund for production and export is divided as follows: 7% for management costs, the directors' fees paid to members of the Commission of Production Aid together with the contribution to the Moroccan organisation by the JAC of a National or International Film Festival; 46,5% for Production aid; 46,5% for Exploitation.

- ▶ **The cinematographic sector has capitalized on the attraction of Casablanca to foreign investors**
  - Casablanca – and Morocco generally – have been able to draw on their specific advantages (beauty of landscape, climate, but above all the cheap manpower and the major facilities granted by the authorities) and to develop the appeal of its cinematographic sector through financial and administrative measures and fiscal incentives.
  - **The Government has offered a certain number of incentives to foreign producers, on the initiative of the CCM:**
    - the co-operation of all official Government forces, namely: the Royal Armed Forces, the Royal Air Force, the Royal Marine Force, the Royal Gendarmerie and the National Security Police
    - the simplification of the procedure for the temporary import of arms and munitions required for the making of films
    - rebates given by Royale Air Maroc for the air transport of goods and people
    - a token charge for shooting films in historic sites and monuments
    - exemption from VAT for all goods and services purchased in Morocco
    - the simplification of the Customs clearance procedure when importing or exporting filming equipment
    - the creation within the C.C.M. of services which will facilitate procedures and contacts with the departments and authorities involved with film making
- ▶ **Today, local cinematographic production shows weaknesses linked essentially with foreign competition and heavy taxation**
  - No Moroccan film has so far succeeded in breaking even. Local production has to face strong foreign competition and heavy taxation (this applies both to foreign and Moroccan films): distributors prefer foreign films which they buy at lower prices to Moroccan films. Copies of films are cheaper, as the film has already been amortised, either in its own country or across other markets.
  - Thought is being given to revitalising local film production: fiscal measures (tax rebates), economic measures (coproduction or coparticipation in order to reach the world market), commercial measures (quotas in production and exploitation), political measures or cultural measures (meetings and festivals)
- ▶ **Morocco has many assets, which so far have been only partially exploited, which should enable it to build on the success of the development of the cinematographic industry**
  - Encouragement of the establishment of companies specialising in the multimedia and new technologies: information technology and communication technology (video games, generative computer graphics, ADSL Internet)
  - Presence of an expatriate westernised population able to attract foreign cinema and arts distribution circuits
  - Large and predominantly young population representing a large potential viewing public
  - Existence of a large diaspora (Moroccan communities abroad) promoting the distribution of Moroccan products throughout the World, the presence of well-known actors and entertainers in that diaspora (assuring their export to the West)
- ▶ **To complete this strategy based simultaneously on the attraction of foreign productions and the development of local productions, Casablanca is also setting its hopes on the creation of a centre of excellence in the cinema industry**
  - The Casablanca Cinema Training School (EMCC) was established to **train a qualified Moroccan workforce**, in response to the shortage suffered by the Moroccan cinematographic industry. **It is also playing a part in the development strategy of social cohesion in Casablanca.**
    - The School opened in October 2008 as the result of a partnership between the Italian institute LUCE, the National Human Development Initiative (INDH), the Prefecture of Sidi Moumen and Sidi Bernoussi and the Wilaya of Casablanca. It was located in the city because of the presence of television channels and production companies which would guarantee an area for young graduates to “cut their teeth”. The School has an intake of 75 pupils per annum; at the end of 2010, two promotions emanated from that training, i.e. about 150 graduates.
    - This free training falls within the directives recommended by the INDH, as a contribution to combatting unemployment and poverty.
  - Studio M Casablanca, Ecole Française des Arts et Média, is a branch of the Studio M Group, which has four schools in France (Lyon, Marseille, Montpellier and Toulouse). **The School can capitalise on the French network**, which has 18 years of experience and 1 500 students and 140 teaching staff, to develop and benefit from international exchanges.

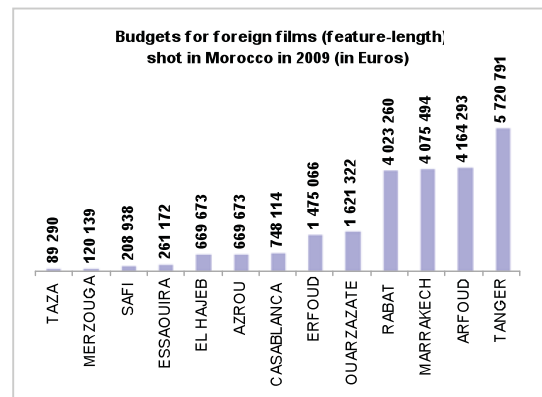
The results of these strategies, which are at the moment being fully identified, are essentially to be seen in the cinematographic sector, which is already enabling the creation of jobs and which is providing Casablanca with large financial returns

▶ **Production costs, which are 50% lower than those of the United States and between 30 and 40% lower than those of Europe, have turned Morocco into the new sought-after location for foreign film makers, particularly in Hollywood**

- Traditional cinematographic destinations such as Latin America are losing their share of the market because of high fees claimed for filming. Within ten years Morocco has become the new competitor to Tunisia and Egypt.
- There has been a steep increase in foreign production budgets (films, publicity spots, television series...) invested in Morocco over the years (12 million US dollars in 1997, 140 in 2001).
- Between 1997 and 2001, 340 shoots (feature films and short films) produced a total of nearly 1.4 billion dirhams, i.e. 125 million Euros (brought to 97% by the feature-films).

▶ **Casablanca is facing big domestic competition in Morocco**

- In 2009, out of 17 feature films shot in Morocco, 4 were filmed in Casablanca.
- The total budget invested by foreign production teams in Casablanca represents only €750 000 (7<sup>th</sup> place). The issue is to attract Hollywood superproductions, synonymous with colossal budgets (for example, the initial shooting in Tangiers represented a budget of 5.7 million Euros).



▶ **The socio-economic returns are considerable and there is a major stake for the town of Casablanca, in a country where one salary supports up to ten people**

- Between 1997 and 2001, 340 shoots created 92 000 jobs: craftsmen for the sets, but also extras, actors, technicians, administrative staff and interpreters.
- A key factor of success guaranteeing the economic value of these shoots for the local market is the **role of the CCM, which requires the association of Moroccan producers, technicians or actors in these films**. By promoting the integration of local cultural employment (as opposed to merely tourist employment) in the foreign productions, this strategy enables operators to learn new cinema techniques and helps the creation of a large market for Moroccan service companies.

## SOURCES

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