

# The Evolution and Impact of Business Clusters in Morocco: A Comprehensive Analysis

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**Abstract**— This study explores the evolution, emergence, and success factors of business clusters in Morocco, with a focus on their role in economic growth and innovation. Through a narrative literature review, the paper examines how Moroccan business clusters have developed over time, analyzing their structure, policies, and external influences. By integrating classical theories (Marshall, 1890; Porter, 1990) with recent studies (2022-2025), the research offers an updated perspective on the dynamics of clustering in the Moroccan economy. Findings suggest that geographic concentration, collaboration, and government policies significantly impact cluster success. Additionally, the paper highlights challenges such as governance inefficiencies and globalization pressures, offering insights for policymakers and business leaders. This study contributes to the ongoing discourse on regional economic development and provides a foundation for future research on industrial clustering in emerging economies.

**Keywords**— Business Clusters, Morocco

## I. INTRODUCTION

In the global economic landscape, business clusters have gained prominence as a catalyst for regional development, innovation, and competitiveness (Carloni, 2022). Business clusters refer to geographic concentrations of interconnected companies, suppliers, and institutions operating in a specific industry or field, and they facilitate collaboration, knowledge sharing, and resource synergies among businesses within the same sector (E.Porter, 2014). The importance of business clusters lies in their ability to strengthen overall competitiveness and innovation within a region; and by fostering a dense network of related enterprises, clusters enable easier access to specialized skills, technologies, and markets (Phambuka-Nsimbi, 2008). Additionally, clusters often attract investments, promote efficiency, and contribute to regional economic development by establishing a critical mass of expertise (Malmberg & Power, 2020) and resources in a particular industry. With a diverse range of industries, from traditional crafts to emerging technology sectors, Moroccan business clusters play a pivotal role in fostering economic growth and sustainable development. Foreign investments have flowed into these areas, reflecting the country's attractiveness as an investment destination.

This article seeks to provide a synthesized and comprehensive understanding of the factors of emergence and of success of business clusters within the Moroccan business environment. The research also aims to construct an overview of the current state of business clusters in Morocco; which sheds light on the various industries that form clusters, the factors influencing their emergence, and the challenges they encounter in their developmental trajectory.

The research begins by elucidating the concept of business clusters, delving into various scholarly definitions and highlighting the divergences among them. This comparative analysis is essential for advancing the literature on business clusters. Subsequently, the article explores the evolution of business clusters within the Moroccan economy and examines how the current economic landscape fosters their formation and emergence across diverse sectors. The remainder of the paper consolidates key factors contributing to the success of business clusters in Morocco. In summary, this narrative literature review serves as a foundational step in unraveling the intricacies of business clusters in Morocco, as it aspires to contribute valuable insights to academia, policymakers, and practitioners interested in the economic dynamics of this North African nation. The goal is not only to understand the current state of business clusters in Morocco but also to pave the way for future research and policy recommendations that can further propel the nation's economic development.

## II. METHODOLOGY

This study is based on a narrative literature review that encompasses the research state that answers this article's main research questions. In this article were employed the research platforms and databases Scopus, Emerald, CAIRN, and Google Scholar; that encompass citations, published articles and other relevant publications and issued notes from respective organizations. The chosen publications and materials were either in English or in French, with the publication date beginning from 2008; (with the exception of materials that cover theoretical concepts that are considered as a framework for most researches (e.g.: Porter, Beccantini, and Courlet's theories). Additionally, very influential journals were used, which are The Journal of Entrepreneurship and Public Policy; the International Journal of Technology, Learning, and Innovation, and The International Journal of Accounting, Finance, Auditing, Management and Economics.

The chosen publications that this article was set to respond to three questions: Does this publication directly answer one of the research questions? Does this publication provide further explanation of the theories and concepts that are related to business clusters (e.g.: knowledge spillovers)? and does this publication provide consistent information on Moroccan Clusters and how they evolve? Additionally, it was essential to expand beyond the key words of the research and expand to others; with the purpose of shedding light on how business clusters operate within a broader ecosystem that needs to be considered on a high priority.

For that matter, two steps were followed when proceeding to choose the articles that respond to the desired criteria, and in each chosen platform or database: The first step consisted of an initial search articles based on the two key words: "business" and "clusters"; followed by the key words "business clustering" and "clustering morocco". The second step consisted of refining the article and thematic exploration, locating articles and publications that tackle theories and concepts discussed in these articles; using key words including but not limited to: "knowledge spillovers", and "public-private partnerships".

When proceeding with the first step, a significant challenge arose in navigating potential confusion with the term "clusters" that is extensively used in the health sector and IoT domain. To address this, additional filters were introduced, expanding the search criteria to include words variations such as "Business AND clustering," and "business cluster." This strategic adjustment proved instrumental in enhancing the effectiveness of article filtering, successfully mitigating the risk of ambiguity. As a result, the refined search on the Scopus platform yielded four key articles that specifically addressed essential keywords like "business", "clustering", and "Morocco". Despite the vast array of articles suggested by Scopus, only two emerged as directly relevant to the research topic.

Google Scholar and CAIRN were employed to achieve the success of the first step to find more articles, resulting in not only relevant published articles that are Scopus indexed, but also unveiled relevant materials such as conference materials, government published notes, and books not present in the platform Scopus. Google Scholar was then employed to explore all the mentioned combinations of keywords, which resulted in a broader set of results providing with key words "business" and "clusters", the interface provided Approximately 16000 Results, indifferent to all periods of time. The Scopus platform didn't provide articles that cover business clusters in Morocco; especially when proceeding to add the keyword "Morocco"; but the platform indeed allowed a good exploration of the topic on a global perspective. On the other hand, Google Scholar and CAIRN, allowed a better exploration of the topic in Morocco with noteworthy examples include materials issued by the Cycle des Hautes Études pour le Développement Économique -CHEDE- under the title "Stratégies de développement au Maroc" by the Ministry of Industry, Trade, and New Technologies.

After delving into the articles uncovered during the initial stage, it became more streamlined to discern the comprehensive elements constituting the ecosystem encompassing global business clusters, with a particular focus on the Moroccan context. Consequently, the second phase, involving the identification of core concepts, unfolded more smoothly and efficiently. The search results presented a variety of options elucidating the intricacies of business clusters, encompassing theories, their role in sectoral development such as industry and tourism, among others. Both Google Scholar and CAIRN – with yielding more than 89 results- facilitated a deeper exploration of the subject, thereby broadening the spectrum of utilized literature that delved into the set elements like knowledge spillovers, tacit knowledge, collaborative innovation, and territorial and industrial policies in the Moroccan context.

### III. CONCEPTUAL FRAMEWORK

Michael E. Porter defines a Cluster as “geographic concentrations of interconnected companies, specialized suppliers, service providers, firms in related industries, and associated institutions (e.g. universities, standards agencies, trade associations) in a particular field that compete but also cooperate (E.Porter, 2014). Silicon Valley and Hollywood stand out as globally renowned clusters, recognized for their unparalleled success. However, according to Michael E. Porter, it is important to note that clusters, while exemplified by these two giants, are not exclusive phenomena; in fact, they are exceptionally common. This paradox reveals a critical insight into the dynamics of our global economy: the sustained competitive advantages are increasingly rooted in local attributes such as knowledge, relationships, and motivation. These intrinsic qualities become powerful catalysts, creating an environment where distant competitors struggle to replicate the unique synergy and innovation fostered within these local hubs. As the world becomes more interconnected, the significance of local strengths grows, solidifying their role as crucial elements in shaping competitive advantages in the ever-evolving global landscape.

On the other hand, foundational definitions of clustering were determined by economists Marshall, Beccantini, and Courlet, which share a common ground that primarily revolves around the spatial agglomeration of related economic activities. Alfred Marshall, in 1890, introduced the concept of industrial districts, positing that geographically proximate firms within similar industries tend to form clusters. Marshall's vision underscores the localized concentration of industries, fostering synergies and specialization within a specific region (Marshall, 1890). Giacomo Beccantini further developed Marshall's (Beccantini, 2017) notion of clustering with his emphasis on "industrial districts." According to Beccantini, these are socio-economic systems characterized by a dense network of interconnected small and medium-sized enterprises (SMEs) located in a specific geographical area. Beccantini's definition highlights the intricate social and economic interconnections among small and medium enterprises within a defined spatial zone, promoting collaborative advantages. Building on these ideas, Claude Courlet expanded the concept of industrial districts and introduced the term "local productive systems." Courlet's contribution extends beyond mere geographic proximity, emphasizing the embeddedness of firms in their local environment (Claude Courlet, *L'Economie territoriale*, 2008). He underscored the significance of local institutions, culture, and social context in shaping the competitiveness and success of clusters.

The various definitions, while being considered complementary on one hand, have risen on the other hand a certain level of confusion the actual labelling of this grouping of companies. From districts, to regional industrial complexes; there is little common agreement on ways to label the basics in which companies and ventures can commonly form these said clusters. Still, the main perspective of difference noticed is that Courlet's perspective broadens the understanding of clustering, incorporating the role of local factors in the economic dynamics of specific regions. On the other hand, Beccantini interfering to add up to Marshall's work represents an opportunity to enrich the literature, as Beccantini added up by focusing on SMEs and focusing on collaboration as the key factor of clusters 'success.

Clusters can be put at the service of many sectors such as in tourism (Fabry, 2009)., and foreign investments can be attracted by the presence of clusters, as this creates synergies, facilitates knowledge exchange and promotes innovation (EL KADIRI, BENTOUmia, MCHICH, & MKIK, 2023). The concept of industry clustering has generated much discussion in regional economic development theory and practice in recent years (Bergman & Feser, 2020). Still, it is fair to say that an accepted definition or a unified theoretical framework has failed to emerge from the discussion, as the concept often seems to enliven itself under divergent theoretical approaches, including but not limited to work on agglomeration economies, industrial districts, business networks (Braun , McRae-Williams, & Lowe ), knowledge spillovers, and regional innovation systems (Bekele & Jackson , 2006).

The most well-known and reliable study on cluster dynamics that support the concept of business clustering is the Cluster Life Cycle theory (Ostapenko, Africano, & Meneses, 2022). The Cluster Theory (Marshall, 1890), industry life cycle and product life cycle theories are the sources of inspiration for the development of the CLC theory. Cluster dynamics (Osarenkhoe & Fjellstrom, 2022) and businesses' growth pathways can be followed by distinct clusters within the same industry, as the life cycles of clusters and industries varies). As a result, clusters can expand or contract without regard to the growth of the industry. Evolutionary economic geography (EEG), which recognizes clustering as a regional phenomenon, has served as an inspiration for the development of CLC theory, combining notions like path development and lock-in circumstances.

#### IV. BUSINESS CLUSTERS IN MOROCCO: AN OVERVIEW

##### *A. Morocco's economic landscape, and clusters' evolution within it:*

It is crucial to understand the current evolution of Morocco's economy in order to understand the extend of support towards Business Clusters and the factors of their emergence and success. Like many countries that favor clustering as a business practice such as Italy, clusters were built in Morocco to enrich the economic landscape and to especially attract large contractors to outsource allowing growth for the country ( El Idrissi, Zerrouk, Zerrari, & Monni, 2020). Being classified by the World Bank as Lower Middle-Income Country, with an annual GDP Growth of 1.3% (The World Bank in Morocco in Data, 2022), Morocco's economic landscape is undergoing a transformation marked by a blend of traditional sectors and a growing emphasis on modernization and diversification. The nation's economy is diverse, encompassing agriculture, mining, manufacturing, and services. The government is actively working to reduce dependency on agriculture and foster economic diversification.

Furthermore, Morocco's economy is marked by a rich tapestry of industries, encompassing both traditional and modern economic activities, and its strategic location between Europe and Africa has facilitated the pursuit of trade agreements ( Cammett, 2007), with the government implementing economic reforms to attract foreign investment, enhancing the overall business environment. The mining industry, with a notable focus on phosphates, positions Morocco as a global leader in phosphate exports, a key component in fertilizer production. Additionally, in the agricultural sector, Morocco has established itself as a producer of diverse crops such as cereals, citrus fruits, olives, vegetables, and livestock. This sector holds particular significance as a major employer, especially in rural areas where it plays a crucial role in sustaining local livelihoods. Furthermore, Renewable Energy initiatives, particularly in solar and wind energy, underscore Morocco's commitment to diversifying its energy sources, reducing dependence on fossil fuels, and fostering sustainability (El Alami, 2018).

The government is actively promoting public-private partnerships to support economic growth (Phambuka-Nsimbi, 2008), and foreign investments have flowed into this sector, bolstering economic diversification and signaling the country's attractiveness as an investment destination. However, Morocco grapples with challenges, including high unemployment rates, especially among the youth, and socioeconomic disparities between urban and rural areas. The government acknowledges the importance of addressing these issues and considers them a priority in its ongoing efforts to ensure sustainable economic progress (EL WAATMANI & MAKHTARI, 2021). Overall, this economic diversity across various sectors equips Morocco with resilience and dynamism, enabling the country to navigate global economic challenges and leverage its strengths in different areas. Ongoing infrastructure projects in construction and real estate, including transportation and urban development, contribute to the country's economic development.

##### *B. Moroccan clusters: examples of the most prominent industries*

The Ministry of Industry, Trade and New Technologies in Morocco defines Clusters as a non-profit association whose members are companies, research or training centers and institutions, operating in the sectors industrial and technological, with a common development strategy and whose statutory purpose is to stimulate the emergence of innovative collaborative projects.

In the Moroccan economic landscape, business clusters represent concentrated hubs of interconnected companies and institutions operating within specific industries or related sector. However, some clusters, especially those launched in 2013, do not hold the non-profit position, and instead chose to be either have a defined a subsidy-self finance plan or to be fully funded by the state, including for example Morocco Numeric Cluster (MNC) ( El Idrissi, Zerrouk, Zerrari, & Monni, 2020). With special funds destined as support funds for clusters in over 3years, and the development of various programs to support them such as TATWIR Program, Morocco focuses on a well-structured vision that consists of Promote the emergence of clusters around, as well as stimulate the development of collaborative and innovative projects (Iraqui, 2012).

From Electronics, Textile, and Renewable Energies to other industries including but not limited to Agrobusiness and Environmental Services, several noteworthy business clusters successfully operate in Morocco, contributing to the nation's economic diversification and competitiveness:

The Information and Communication Technology (ICT) cluster, spanning Rabat, Casablanca, and Marrakech, fosters innovation and digital transformation, emphasizing solar and wind projects, and aligning with Morocco's commitment to sustainability ( El Idrissi, Zerrouk, Zerrari, & Monni, 2020)

Additionally, a dedicated Aerospace cluster "The Aerospace Moroccan Cluster" in Casablanca, aims to establish Morocco as a global aerospace player (Ministère de L'Industrie et Du Commerce, 2020); and the he textile and



apparel industry, concentrated in cities like Casablanca and Tangier, is a prominent cluster known for textile exports.

Another example of successful industries is the tourism industry, with key destinations like Marrakech and Agadir, forms a cluster comprising hotels, travel agencies, and tour operators, contributing significantly to overall growth (EL KADIRI, BENTOUMIA, MCHICH, & MKIK, 2023). To promote destinations, improve Morocco's capital and its attractiveness in the eyes of visitors and tourism promoters, Morocco is counting on an integrated and diversified offer, with significant reception capacities and activities have been created to be reinforced to meet quality requirements and improve attractiveness.

In conclusion, these diverse business clusters play a pivotal role in Morocco's economic landscape, fostering collaboration, innovation, and specialization within specific industries. Government initiatives, infrastructure development, and policies geared towards attracting domestic and foreign investment underpin the growth and sustainability of these clusters. The success of these clusters previously mentioned is due to various factors of success and of emergence that further discussed in this article; and those that failed

#### V. FACTORS INFLUENCING THE EMERGENCE OF BUSINESS CLUSTERS IN MOROCCO

Is the foundation of Morocco's cluster development truly diversified, or does it rely heavily on a singular source of information? Delving into the intricacies of the country's approach, it becomes evident that a comprehensive narrative literature review is imperative for a nuanced understanding. Thus, a thorough exploration of diverse sources becomes imperative, ensuring a more robust foundation for constructive critique and informed analysis. The formation of business clusters (H.M. Ketels & Memedovic, From clusters to cluster-based economic development, 2008) is a dynamic process shaped by various factors, where interactions among businesses, institutions, and the surrounding environment play a pivotal role. In the context of Morocco, several key drivers contribute to the emergence and growth of business clusters, exhibiting both commonalities and unique characteristics compared to global:

The first factor is proximity and geographic concentration are foundational factors influencing cluster formation in Morocco. Physical closeness encourages face-to-face interactions, collaboration, and resource exchange among businesses ( EL WAATMANI & MAKHTARI, 2021), fostering efficient supply chain management and reducing transportation costs. The importance of geographic concentration is evident in the clustering of industries within specific regions, such as Tangier and Kenitra for the automotive sector.

The second factor is collaboration and Knowledge Sharing (Piperopoulos, 2016) are important factors that allow the emergence of a Moroccan Cluster. These clusters often operate on the principles of collaboration and knowledge sharing, as companies may collaborate on research and development, share best practices, and collectively address industry challenges. This collaborative environment fosters innovation and efficiency, as clusters with a mix of industries can benefit from cross-industry knowledge transfer. Established businesses within a cluster may actively contribute to the development of new entrants by sharing industry-specific knowledge and expertise ( Béraud, Du Castel, & Cormera, 2012). This helps in maintaining a vibrant and competitive cluster ecosystem. The increased attention in recent years on the importance of knowledge and innovation as important drivers underpinning sustained industrial competitiveness has brought some of these core aspects of economic geography on to the research agenda in a wider group of economic researchers (Malmberg & Power, 2020).

Adequate infrastructure serves as a cornerstone, encompassing well-developed transportation networks, state-of-the-art research and development centers, and thriving educational institutions. Seamless connectivity and accessibility are pivotal for fostering collaboration and innovation within clusters. Furthermore, the role of government policies and incentives cannot be overstated, because in addition to providing a conducive environment, policymakers can actively influence the clustering landscape through strategic measures such as tax breaks and regulatory support. These incentives act as catalysts, drawing businesses towards specific regions and aligning with broader economic development goals. In the intricate tapestry of cluster dynamics, a supportive infrastructure coupled with strategic government interventions forms a powerful synergy, propelling the sustainable growth and competitiveness of business clusters. Additionally, the continual evolution of technology and its integration into infrastructure could serve as a transformative force, creating new avenues for collaboration and knowledge exchange within clusters.

Market demand is a compelling factor driving cluster formation in Morocco, as seen in the concentration of clusters where strong demand exists for particular products or services. The emphasis on research and development, supported by the presence of R&D institutions, universities (GALIULINA & TOUATE, 2022), and innovation centers, aligns with global trends emphasizing technological advancements as a key driver for clusters.

Networking (H.M. Ketels & Memedovic, From clusters to cluster-based economic development, 2008) and collaboration opportunities are integral to Moroccan clusters, providing a supportive ecosystem for companies to share resources, collaborate on projects, and address industry challenges collectively. Historical and cultural factors contribute to cluster formation in Morocco, with the legacy of certain industries and cultural traditions influencing businesses to cluster in specific areas.

## VI. FACTORS OF SUCCESS OF CLUSTERS IN MOROCCO:

As light was shed on the key factors of emergence of Moroccan Clusters, it is also crucial to delve into the literature surrounding the factors of success of these clusters. Based on the literature, business clusters operate within an ecosystem of various external elements that represent keys to success of clusters when considered thoroughly; and the level of awareness of the complexity of this ecosystem can make or break the success of clusters. Another important consideration is that it is no doubt that some factors of emergence represent ones of success at the same time; which is very important to highlight.

First, research collaboration within clusters is a driving force behind technological advancements and innovation. Academic institutions, research centers, and companies come together to collaborate on research and development projects, pushing the boundaries of knowledge and contributing to industry evolution (GALIULINA & TOUATE, 2022). Best practice sharing is another integral aspect, where businesses exchange insights, lessons learned, and successful strategies. This knowledge-sharing culture significantly improves industry standards, allowing companies to adopt more effective processes and elevate their overall performance. The presence of educational institutions and research centers within or in proximity to clusters plays a vital role in knowledge infusion. This collaboration ensures a continuous flow of new insights, as the latest research findings are seamlessly integrated into practical applications. One crucial facet of collaboration within clusters involves inter-firm partnerships, where businesses unite through joint ventures, alliances, or partnerships. Such collaborations yield shared resources, cost efficiencies, and joint marketing strategies, fostering a collective strength that benefits all involved.

Knowledge spillovers play a significant role in the success of Moroccan business clusters (Fioravanti, Stocker, & Macau, 2021) where the exchange of information, skills, and innovations enhance productivity and competitiveness. Creative industries thrive on proximity dynamics, fostering knowledge spillovers that occur when actors benefit from innovative ideas, discoveries, and artistic innovations within and across activities (Béraud, Du Castel, & Cormera, 2012). In today's knowledge-based economy, the ability to come up with new and better ways of organizing the production and marketing of new and better products and services is determining the long-term ability of firms to prosper. This does not mean that cost considerations are unimportant, but that the combined forces of globalization of markets and deepening divisions of labor make knowledge creation and innovation increasingly important.

Second, public-private partnerships between the government and industry players play a pivotal role in enhancing the functionality of business clusters (Xiong, Chen, Wang, & Zhu, 2018). These collaborations extend to joint initiatives, research projects, and infrastructure development, reinforcing the long-term sustainability and growth of the clusters. This synergy between government and industry further strengthens the clusters' ability to navigate global challenges, including economic uncertainties and technological disruptions. The adaptability of these clusters to evolving market conditions and their embrace of new technologies contribute significantly to their resilience in the face of dynamic external factors.

Thirdly, Access to a skilled labor pool is another critical driver of success, with clusters forming around regions boasting a specialized and knowledgeable workforce. This facilitates innovation and efficiency within industries, aligning with global trends in cluster formation. Clusters prioritize workforce development (NAIT LACHGAR & BENMOUSSA, 2020) through ongoing skill enhancement initiatives. Investments in training programs, workshops, and educational endeavors are made to ensure that participants within the cluster possess the necessary skills to drive innovation, creating a dynamic and adaptive workforce.

Finally, Globalization (Foghani & Mahadi, 2017) and Export Opportunities are also an important factor, as this globalization aspect enhances the competitiveness of the clusters, making Business clusters in Morocco often leveraging their strategic geographic location to tap into global markets. Additionally, companies within clusters

may benefit from export opportunities, taking advantage of Morocco's position as a gateway between Europe and Africa.

On a personal perspective, the prosperity of a cluster hinges not only on external support and the presence of ongoing initiatives that bolster these clusters but also on personal initiatives that showcase the level of optimization of these existing resources. The literature extensively outlines the critical factors contributing to the emergence and success of clusters, but despite the available knowledge, numerous clusters have faltered due to inadequate consideration of these crucial factors. Moreover, the vitality of a thriving business cluster rests on its ability to stay current with the rapid shifts in industries. Some sectors evolve dynamically, while others reach a standstill, and certain areas exhibit untapped potential. To ensure sustained success, it is imperative for clusters to navigate these industry dynamics, adapting to changes, seizing opportunities, and avoiding stagnation. Beyond mere adherence to established principles, constant vigilance and adaptability play pivotal roles in the enduring success of business clusters.

## VII. CONCLUSION

In summary, this research enhances the crucial role of business clusters in driving economic growth and innovation in Morocco, highlighting the factors that contribute to their emergence and success. The success of these clusters is linked to various elements such as proximity, collaboration, infrastructure, government support, market demand, networking, and historical and cultural influences. Morocco's diverse economic landscape, marked by initiatives to diversify from traditional sectors, has given rise to clusters in industries like aerospace and textiles. The dynamic factors influencing cluster emergence and success encompass proximity, collaboration, infrastructure, government policies, knowledge sharing, research collaboration, public-private partnerships, access to skilled labor, and globalization. To ensure sustained success, the study emphasizes the need for adaptability to industry changes, continuous vigilance, and personal initiatives in seizing opportunities for enduring economic development in Morocco.

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