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Independent thematic evaluation of the UNIDO cluster and networking development initiatives

Evaluation of the UNIDO export consortia initiative in
MOROCCO

Project UE/MOR/04/127:

Appui à la création de consortia d'exportation

Project UE/MOR/07/007:

Renforcement des capacités nationales dans la
promotion et accompagnement de consortia
d'exportation



UNITED NATIONS
INDUSTRIAL DEVELOPMENT ORGANIZATION

UNIDO EVALUATION GROUP

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UNITED NATIONS INDUSTRIAL DEVELOPMENT ORGANIZATION

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The views and opinions of the team do not necessarily reflect the views of the Government of Uganda and of UNIDO.

This document has not been formally edited.

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The evaluators hope that this report will be instrumental in discussions as regards (i) the project results, (ii) the programming of project activities for 2009 and 2010 and (iii) the possible replication and expansion of export consortia in Morocco.

Moreover, conducted within the context of a wider thematic evaluation of UNIDO's Cluster and Networking Development Initiatives, we hope that the analysis of the Moroccan experience and UNIDO's contribution regarding the development of export consortia in Morocco is useful for similar initiatives elsewhere.

Abbreviations

AMITH	Association Marocaine des Industries du Textile et de l'Habillement
ANPME	Agence Marocaine de Promotion de la Petite et Moyenne Entreprise
ASMEX	Association Marocaine des Exportateurs
CFA	Centre de Formation par Apprentissage
CGEM	Confédération Générale des Entreprises du Maroc
CI	Coopération Italienne
CMPE	Centre Marocain de Promotion des Exportations
CNCE	Conseil National du Commerce Extérieur
CND	Cluster and Networking Development
EACCE	Etablissement Autonome de Contrôle et de Coordination des Exportations
EU	European Union
FCCIS	Fédération des Chambres de Commerce, d'Industrie et de Services
FMI	Fonds Monétaire International
FOMAN	Fonds National de Mise à Niveau
GDP	Gross Domestic Product
GIAC	Groupements Interprofessionnels d'Aide au Conseil
GIE	Groupement d'Intérêt Economique
GoM	Government of the Kingdom of Morocco
GTZ	Coopération Technique Allemande au Développement
IDE	Investissement Direct Etranger
IGR	Impôt général sur le revenu
ILO	International Labour Organization
IR	Impôt sur le Revenu
INDH	Initiative Nationale pour le Développement Humain
IDH	Indicateur de Développement Humain
IP	Integrated Programme
IS	Impôt sur Sociétés
MCE	Ministère du Commerce Extérieur
MCINET	Ministère du Commerce, de l'Industrie et des Nouvelles Technologies
MDG	Millennium Development Goals
MEDA	Programme de coopération du partenariat euro-méditerranéen
NA	Not Available

OECD	Organization for Economic Cooperation and Development
OFPPT	Office de la Formation Professionnelle et de la Promotion du Travail
ONUDI	Organisation des Nations Unies pour le Développement Industriel
PAAP	Programme d'Appui aux Associations Professionnelles
PAE	Programme d'Appui aux Entreprises
PIM	Programme Intégré Maroc
PIB	Produit Intérieur Brut
PME	Petite et Moyenne Entreprises
PMI	Petite et Moyenne Industries
RBM	Results Based Management
SC	Steering Committee
SMAEX	Société Marocaine d'Assurance à l'Exportation
SME	Small and Medium Enterprises
TFZ	Tanger Free Zone
UCO	UNIDO Country Office
UNDAF	UN Development Assistance Framework
UNIDO	United Nations Industrial Development Organization
UR	UNIDO Representative
VAT	Value Added Tax
ZLE	Zone de Libre Échange
Currency	DH : Dirham ¹ MDH: Million Dirham MMDH: Billion Dirham US \$: US Dollars € : Euros

¹ Exchange rate: 1 Moroccan Dirham (DH) is approx. € 0.09

Glossary of evaluation terms ²

Term	Definition
<i>Baseline</i>	The situation, prior to an intervention, against which progress can be assured
<i>Effect</i>	Intended or unintended change due directly or indirectly to an intervention
<i>Effectiveness</i>	The extent to which the development objectives of an intervention were or are expected to be achieved
<i>Efficiency</i>	A measure of how economically resources/inputs (funds, expertise, time, etc.) are converted to results
<i>Impacts</i>	Positive and negative, primary and secondary long-term effects produced by a development intervention, directly or indirectly, intended or unintended
<i>Indicator</i>	Quantitative or qualitative factor or variable that provides a simple and reliable means to measure achievement, to reflect the changes connected to an intervention, or to help assess the performance of a development actor
<i>Intervention</i>	An external action to assist a national effort to achieve specific development goals
<i>Lessons learned</i>	Generalizations based on evaluation experiences with projects, programs, or policies that abstract from the specific circumstances to broader situations. Frequently, lessons highlight strengths or weaknesses in preparation, design, and implementation that affect performance, outcome, and impact
<i>Logframe (logical framework)</i>	Management tool used to improve the design of interventions, most often at the project level. It involves identifying strategic elements (inputs, outputs, outcomes, impact) and their causal relationships, indicators, and the assumptions or risks that may influence success and failure. It thus facilitates planning, execution and evaluation of a development intervention. Related term: results based management (RBM)
<i>Outcome</i>	The likely or achieved short-term and medium-term effects of an intervention's outputs. Related terms: result, outputs, impacts, effect
<i>Outputs</i>	The products, capital goods and services which result from a development intervention; may also include changes resulting from the intervention which are relevant to the achievement of outcomes

² Based on a glossary prepared by OECD's DAC Working Party on aid evaluation, May 2002

<i>Recommendations</i>	Proposals aimed at enhancing the effectiveness, quality, or efficiency of a development intervention; at redesigning the objectives; and/or at the reallocation of resources. Recommendations should be linked to conclusions
<i>Relevance</i>	The extent to which the objectives of a development intervention are consistent with beneficiaries' requirements, country needs, global priorities and partners' and donors' policies. Note: Retrospectively, the question of relevance often becomes a question as to whether the objectives of an intervention or its design are still appropriate given changed circumstances
<i>Results</i>	The output, outcome or impact (intended or unintended, positive and/or negative) of a development intervention. Related terms: outcome, effect, impacts
<i>Risks</i>	Factors, normally outside the scope of an intervention, which may affect the achievement of an intervention's objectives
<i>Sustainability</i>	The continuation of benefits from a development intervention after major development assistance has been completed. The probability of continued long-term benefits. The resilience to risk of the net benefit flows over time
<i>Target groups</i>	The specific individuals or organizations for whose benefit an intervention is undertaken

Executive Summary

This evaluation concerns two consecutive projects (phases) covering support to the development of export consortia in Morocco. The assessment was carried out within the context of an independent thematic evaluation of UNIDO Cluster and Networking Initiatives of which support to export consortia - a specific type of networking among enterprises - is integral part.

The evaluation has been conducted by a team consisting of Younes Nejjar (national consultant) and Leny van Oyen (team leader). The field mission took place from 21-27 October 2008.

Background

The first phase (project UE/MOR/04/127 - *Appui à la création de consortia d'exportation*) was developed based on the UNIDO experience, including in the sub-region (Tunisia). An awareness building event held in Morocco in 2002 triggered the Moroccan request for UNIDO assistance to create "pilot consortia" as a basis for developing a national strategy in this regard. Funding (Italy) was secured as of 2004. As the result of the achievements of the first phase which covered the period 2004-2007, a second phase was developed and funded (also by Italy) under project UE/MOR/07/007 - *Renforcement des capacités nationales dans la promotion et accompagnement de consortia d'exportation*). This second phase started as of 2008 and has a duration of 3 years. The intervention is part of UNIDO's first and second Integrated Programme in Morocco (latter was launched in May 2007).

Intervention logic

The intervention covers the following interrelated focus areas:

- Sensitization aimed at enterprises and support institutions, with due consideration for sectoral and geographic outreach;
- Assistance to export consortia in the process of their formal creation and start-up phase;
- Capacity building of public and private sector partners, making use of and adapting where needed available tools developed by UNIDO and field experiences;
- Advice as regards the development of incentives/improvements in the regulatory environment pertaining to export consortia.

Assessment

The support was and continues to be relevant, as its rationale is fully in line with the priorities of the Government of Morocco to enhance the competitiveness of the country's industrial sector and to foster export development. The design of the two phases followed a similar pattern (along the lines of the above-mentioned intervention logic) and has involved local partners. The project is well anchored to and benefits from active

commitment of the Ministry of Foreign Trade (chief counterpart) and works actively with a range of core partners (including though not limited to the Moroccan Exporters Association, the Moroccan Export Promotion Centre, the National Agency for SME Promotion, the Federation of Moroccan Enterprises, and sector associations such as the one representing the textiles and clothing sector. Linkages with other (sub-) components within the subsequent UNIDO Integrated Programmes as well as with other donor supported programmes were not explicitly built into the project design, though some collaboration efforts were initiated during implementation.

The project team in place is highly motivated, very competent, and well appreciated by both enterprises involved in the support and the project's core partner institutions. The team is small: two national experts (of which one very recently on board and working on part-time basis), and two international experts of which one is Morocco based and dealing with day to day project operations and one roving consortium expert who conducts periodic return missions (that have decreased in number over time).

Results achieved exceed project objectives in terms of number of consortia (15 created; 3 in the process of formal establishment and another 6 under preparation as per the status of end October 2008). The trend towards geographic and sectoral diversification is encouraging. To illustrate, whereas in the first phase there was a concentration of consortia in the textile and clothing sector (5 out of 10 of the consortia in existence as of the end of the first phase), there is an indication of gradual outreach to other sectors. The currently existing consortia (15) are spread over 7 sectors, with two thirds in the textile/clothing and food processing sectors. This is not surprising, considering the weight of these two sectors in Morocco's export position.

The concept has attracted enterprises of different sizes (large, medium and also some small enterprises). In particular younger business executives see the "alliance mode" as an unavoidable approach in a world characterized by growing competition. On average the consortia bring together 3 – 7 enterprises, with an exception of 22 members in the case of a consortium in the food processing sector. Some include competitors (horizontal linkages); many consist of enterprises with complementary operations (stimulating vertical linkages along the value chain). Two thirds of the consortia have designated a director/coordinator, most working full-time for the consortium.

A vast range of awareness building activities have been undertaken so far, targeting enterprises and support institutions (public and private), both directly by the project and through participation of the project team in events organized by partner institutions at the national, regional and local level. Exposure to experiences elsewhere has been facilitated through study tours, dedicated global training events and expert group meetings (the most recent one was held in Rabat in May 2007). The project has organized locally a first training of consortium facilitators in 2004 and a second series of training seminars has started as of October 2008, aimed at both public and private support agents across the country.

Regarding incentives, combined efforts of the Moroccan stakeholders and guidance by the project team have resulted in measures dedicated to export consortia, including the establishment of a support fund managed following a public-private partnership principle, as well as different types of preferential treatment applied to business support schemes and services by different partners institutions.

Notwithstanding the laudable achievements so far, the evaluation mission observed that there is scope for improvement in a number of areas that are to be addressed in the remainder of the project life. In this respect the timing of the evaluation around “mid term” (during the first year of the second phase) is considered ideal, in that there is a chance for observations of the evaluation mission to be used provided accepted by the stakeholders.

The points for improvement include in particular: (i) the need to prepare, discuss and decide on steps to be taken in order for support to export consortia to continue beyond the life of the project. This involves both the issue of funding of support in the different stages of consortium creation and development and the need for increase in the number of consortium brokers. The latter play a pivotal role in the often lengthy process of consortium creation yet are too few so far. Also (ii) the performance measurement system needs to be sharpened, to be able to assess in more precise terms the results over time of such strategic alliances supported by the project on member enterprises. Moreover, (iii) inter-consortia exchanges are to be intensified (both between consortia in the same sector as well as bringing together all consortia), as these are an excellent source of mutual learning. In addition, (iv) operational linkages with related support programmes and projects in the country need to be deepened to mobilize additional support for existing and emerging consortia. This can include different types of support, such as association strengthening (based on the fact that in particular sector associations have a key role to play in support to export consortia creation and development), schemes focused on enterprise upgrading etc.

The way forward

Based on the analysis of the achievements, including strong points and points for improvement, the evaluation resulted in a number of recommendations to be considered during the remaining two years of project operations, addressed to UNIDO, to the Government of Morocco and to the donor (Italy). As regards the recommendations for **UNIDO**, the need for including discussions and decisions on the exit strategy as part of the 2009/10 work plan, the importance of increasing the number of brokers through class room and on the job training, and the need for refinement of the performance monitoring system are highlighted. As regards the **Government of Morocco**, discussions on the ways and means to maintain and deepen support to consortia, both at this stage and beyond the end of the project, are considered crucial. Attention is also drawn to eventual further improvements in the legal and fiscal framework pertaining to export consortia, where feasible. Furthermore, it is recommended to periodically convene the Steering Committee, particularly in this critical consolidation phase of the project requiring strategic decisions on the future of interventions. As far as the **donor** is concerned, emphasis is placed on the importance for Italy to transfer the second and last allotment soonest to UNIDO, to avoid gaps in project operations during the last two years. In addition, Italy can be of great assistance in fostering linkages such as with related programmes funded by the EU and bilaterally by its member states/other countries, as Italy participates in periodic local donor coordination meetings.

Lessons learned

Among the lessons learned and listed in this report, the following are highlighted:

- consortia creation and development needs time; therefore support to this process requires a project budget that is not necessarily large but should be spread out over several years;
- commitment of the local partners and their ability to influence decision making on support measures is essential;
- hands-on coaching of groups of enterprises requires brokers with the right profile, carefully selected and trained ;
- export focus can facilitate the bundling of enterprises around joint actions that may/may not be purely export focused but are all of essence within the spirit of enterprise competitiveness; it can put the seeds for a wider range of networking and cluster development efforts;
- UNIDO support to export consortia can and should have a link with pro-poor growth support interventions through encouraging collective consortia actions that have direct/indirect poverty reduction effects;
- outreach of export consortia efforts to include also small enterprises is important, as they have much to gain from such alliances;
- in case of “pilot projects”, it is essential to define in the project design how, based on the demonstration cases, the up-scaling/replication process is planned.

1

Introduction

1.1 Objective of the evaluation

1.1.1 Purpose

This evaluation has a dual purpose:

(i) First, the evaluation assesses UNIDO's support to the development of export consortia in Morocco (Phase 1 and Phase 2 to date) in terms of:

- the *relevance* of its objectives within the context of Morocco and of UNIDO's Integrated Programme in Morocco, including the involvement of the main Moroccan stakeholders in project design and implementation (*ownership*);
- the *efficiency* of its implementation covering the quantity, quality, cost and timeliness of UNIDO and counterpart inputs/activities;
- its *effectiveness* covering the extent of achievement of outputs and the use of project results (*outcomes and impact*);
- the probability of persistence of project benefits (*sustainability*).

The evaluation covers two projects, both funded by Italy, namely:

UE/MOR/04/127 - Appui à la création de consortia d'exportation (phase 1 : 2004-2007) ;

UE/MOR/07/007 - Renforcement des capacités nationales dans la promotion et accompagnement de consortia d'exportation (phase 2 : 2008-2010).

In the short term the assessment is to guide the programming and implementation of activities during the remainder of the current project life (2009/2010), based on achievements and lessons learned. In the medium term, it is expected to provide inputs for discussions on the continuation/replication of support of export consortia in Morocco beyond the project.

(ii) Moreover, as the evaluation is conducted within the context of a thematic evaluation covering the UNIDO Cluster and Networking Development (CND) initiatives at large (of which support to the development of export consortia is integral part), the findings of this

evaluation are also feeding into this programme-wide evaluation. Thus, the assessment of the Moroccan intervention is to contribute to the overall evaluation of UNIDO's CND activities, including recommendations as regards UNIDO's future CND strategy, covering both technical cooperation and upstream work.

It is to be noted that, within the context of the evaluation of the first Integrated Programme of UNIDO in Morocco, conducted in September 2004, a first assessment of the export consortium project (phase 1) was carried out. The current evaluation builds on the 2004 evaluation which took place at a very early stage of project implementation. The 2004 assessment noted a certain delay in the start-up of the project, but found the initial activities encouraging and recommended a later evaluation of results (i.e. the subject of the current evaluation).

1.1.2 The mission

The present evaluation was conducted in compliance with UNIDO evaluation policy and guided by the terms of reference of the thematic evaluation of UNIDO's CND initiatives (a summary of which is attached as Annex I).

The field work in Morocco was carried out from 21-27 October 2008 by a team consisting of Mr. Younes Nejjar (national consultant) and Ms. Leny van Oyen (mission team leader).

1.2 Methodology

1.2.1 Document review

The team collected and analyzed project specific information, including project documents, progress reports, consultants' reports, minutes of review meetings, as well as documents describing the UNIDO methodology and tools as regards support to the development of export consortia, experiences elsewhere and exchanges among policy makers and practitioners (expert group meetings). The team also collected and reviewed a number of general documents regarding Morocco, in particular covering relevant strategies and programmes related to private sector/export development.

Overall, available documentation provided adequate information on progress to date as well as on the general context and its evolution. A more detailed overview on progress at the level of the consortia supported by the project - considered relevant for the assessment - was requested to and obtained from the project team in Morocco.

The list of documents used is included in Annex III. This list encompasses the different categories of documents used by the evaluation team.

1.2.2 Interviews and restitution

Interviews were conducted both at UNIDO Headquarters (Vienna)³ and in Morocco. Annex II includes the list of organizations and persons met. At the end of the mission (27 October 2008),

³ In conjunction with the briefing of the team leader of the overall thematic evaluation

the preliminary findings were shared in Rabat in a meeting held at and chaired by the Ministry of Foreign Trade, in which participated representatives of all main Moroccan public and private sector stakeholders involved in the project, the project team, as well the UNIDO Office in Morocco. This provided an opportunity for receiving feedback on the preliminary observations of the evaluation team. A similar discussion took place during the debriefing of the mission team leader in Vienna (6 November 2008). This report reflects the comments received from the different stakeholders in the meetings as well as observations received on the draft report submitted mid December 2008.

1.2.3 Evaluation criteria

The analysis is based on the standard OECD-DAC evaluation criteria⁴: relevance and ownership, efficiency, effectiveness including impact to date, and sustainability (cf. Glossary of evaluation terms, page viii).

1.3 Structure of the report

The report presents the findings of the evaluation team in line with the project cycle logic (identification/design and implementation), based on the above-mentioned evaluation criteria.

Accordingly, the report follows the following structure: after a general description of the country and project context (Chapter 2), an assessment is made of the design stage (Chapter 3). Chapter 4 starts with an overview of achievements to date (including also a summary of the funding and expenditures status), followed by a description of project execution. The assessment of project implementation along the lines of the evaluation criteria is presented in Chapter 5. The chapter ends with a summary overview of the strengths of the project interventions as well as of points for improvement. Chapter 6 presents the recommendations of the evaluation team and lessons learned are described in Chapter 7.

⁴ Organization for Economic Cooperation and Development, Development Co-operation Directorate

2

Country and project context

2.1 Country situation

Morocco has a population of some 30.8 million, spread over 16 regions. The country has embarked on major reform efforts over the past decades, which resulted in substantial socio-economic improvements. GDP per capita is \$4,309 (World Bank, 2008).

Notwithstanding considerable progress, there remain important challenges. During the past years, the Moroccan economy has shown sharply fluctuating growth rates, affected in particular by the performance of Morocco's drought-hit agriculture and rising energy and food prices. Unemployment is high (11%) and the country ranks 126th out of 177 on the Human Development Index, indicating that a substantial proportion of the population remains marginalized.

The bulk of the country's economic activities is concentrated in Greater Casablanca, Rabat, Marrakech, Fès, Tanger and Agadir. Economic diversification has increased in recent decades: the agricultural sector remains vital (employing about half of the labour force), but the manufacturing and services sectors have become more important.

Performance of the secondary sector has been encouraging, with an increase in value addition of 23.3% in the automotive industry, 9.6% in the mechanical and metallurgical industry and 2.2% in the textile industry (period 2006-2007). The growth of the tertiary sector is driven by the performance of in particular telecommunication services and tourism, which has resulted in an increase of value addition of 6.1%. Table 1 below provides some general macro-economic data and trends, complemented by Table 2 which gives an overview of the country's external trade situation.

The country is strongly focused on integrating its economy into the global economy, which is illustrated by the ratification of several free trade agreements with its economic partners, in particular:

- 1996: Association Agreement with the EU leading to a free trade zone (2012);
- 2001: Free Trade agreement with the United Arab Emirates ;
- 2004: Agadir Agreement signed with Egypt, Jordan and Tunisia (as of 2007) ;
- 2004: Free Trade Agreement with Turkey (as of 2006) ;
- 2004: Free Trade Agreement with the USA (as of 2006).

Table 1 Overview of the Moroccan economy: selected data (2007) and trends

GDP per capita	GDP by sector (%)			Inflation rate	Growth rate	Exports (million US\$)	Imports (million US\$)		
	primary	secondary	tertiary						
US\$ 2569	16%	29%	59%	2 %	2,5%	11 913	23 534		
				2003	2004	2005	2006	2007	2008
GDP growth rate				6,1%	5,2%	2,4	8%	2,5%	6,8 % (forecast)
Budget deficit as % of GDP				3,30	3,4	4	1,9	1,7	2,8

Sources: World Bank - World Development Indicators database, September 2008; BMCE Capital

Table 2 Evolution of foreign trade and trends (in MDH)

Years	2002	2003	2004	2005	2006	2007	June 2008
GDP ⁽¹⁾	445 426	477 021	505 015	527 679	577 344	615 373	NA
Imports ⁽²⁾	130 409	136 070	157 921	184 379	210 554	259 748	115 930
Exports ⁽²⁾	86 390	83 887	87 897	99 265	111 979	123 941	80 400
Exports ⁽²⁾ as % of GDP	19,4%	17,6%	17,5%	19%%	19,5%	20,1%	NA
Trade balance ⁽²⁾	-44 020	-52 183	-70 025	-85 114	-98 574	-135 806	-75 531
Exports as % of imports ⁽²⁾	66,2%	61,7%	55,7%	53,8%	53,2%	47,7%	51,%

⁽¹⁾ Source : Ministère de l'Economie et des Finances

⁽²⁾ Source: Office des Changes

The rise in oil prices of the past years has contributed to the deficit on the country's trade balance, notwithstanding the country's export performance, particularly in the industrial and service sectors. The textiles, leather and clothing sector (characterized by subcontracting and co-contracting with foreign business partners) dominates with some 40% of total exports and 52% of manufacturing exports.

2.2 Policy and institutional framework including related support

Policy context

The country's goal is to boost pro-poor growth, with focus on priority areas that are considered engines of growth, including:

Industry: the current industrial strategy is entitled “*Plan Emergence*”, targeting 7 sectors in which Morocco is considered to be competitive (off shoring; automotive industry; aeronautics; electronics; agro-industry; fisheries and textile), is aimed at reducing the trade deficit by half and at creating some 440.000 jobs over the coming 10 years. It is to be noted that the 2009 Draft Budget (*Projet de Loi de Finance*) covers *inter alia* support in the fields of creation of industrial zones; technology parks; SME/handicrafts sector upgrading; training incentives; access to finance.

Exports: the country seeks to intensify its support incentives, aimed at diversifying (i) export products and services and (ii) export markets. The free zone policy instrument of 1995 resulted in the first operational free zone (Tanger). In addition to the export focus of the “*Plan Emergence*”, one can cite initiatives such as the envisaged creation of an Export Support Fund of some 500 Million Dirham (MDH)⁵ and other incentives (e.g. fiscal) that are to foster export development.

Tourism: development of this sector is guided by a strategy called “*Plan Azur*” which aims at positioning Morocco among the top tourist destinations in the world, reaching some 10 million tourists by 2010 and applying principles of sustainable tourism (focus on quality and environmental concerns). The 2009 Draft Budget envisages efforts such as increase in hotel capacity, promotion of regional/local tourism and training incentives.

Agriculture: through its “*Plan Vert*” strategy, obstacles faced in developing agriculture are being addressed, aiming at increasing value addition, upgrading of farming and productivity improvement and targeting particularly exports.

For more details on the policy framework, reference is made to Annex E.

Institutional Framework

A range of public and private institutions play a key role in enterprise support and export development, through both national and external support programmes. Table 3 below gives a schematic overview of the main institutions, their programme priorities and support measures of relevance for the development of export consortia.⁶ For more details on each of the institutions and schemes, reference is made to Annex E.

⁵ Approx. €45 mill.

⁶ The list of priorities/schemes does not claim to be complete, but contains the *main* features of the mandate, priorities and support areas

Table 3 Schematic overview of institutional framework

Institutions	Programme priorities, activities and support measures
Ministry of Trade, Industry and New Technologies (MCINET)	<ul style="list-style-type: none"> • Development and implementation of industrial and trade policies/strategies • SME promotion and development • Support to enterprise upgrading • Support to normalisation, quality and certification • Participation in trade negotiations
Ministry of External Trade (MCE)	<ul style="list-style-type: none"> • Policy and regulatory role as regards foreign trade including support schemes/incentives • Establishment of Support Fund for consortia (managed by ASMEX) • Heading the Management Board of this Support Fund (including also CMPE, ANPME, and ASMEX; see below)
Moroccan Centre for Export Promotion (CMPE)	<ul style="list-style-type: none"> • Organization of seminars/workshops • Conducting export readiness diagnostics (sectoral) • Preferential treatment of consortia as regards subsidies for trade missions (up to 85% of costs) • Organization of trade related missions abroad (market orientation, sourcing, B to B) • Organization of and participation in trade fairs • Support in negotiation
SME Promotion Agency (ANPME)	<ul style="list-style-type: none"> • Support to groups of enterprises interested in constituting/developing a consortium • Covering cost of expertise for targeted actions (advice; technical assistance; promotional efforts) • Management of enterprise modernization programme with possibility of cost-sharing up to 90% of business support services
Association of Exporters (ASMEX)	<ul style="list-style-type: none"> • Management of Support Fund put in place by MCE : <ul style="list-style-type: none"> ☐ Assistance to consortium start-up ⁷ <ul style="list-style-type: none"> 50% of acceptable expenditures Ceiling: 100.000 Dirhams Release : through one single operation ☐ Assistance to promotional activities ⁸ <ul style="list-style-type: none"> Year 1: 75% of acceptable expenditures Year 2: 60% Year 3: 50% Ceiling: 200.000 Dirhams Release: through two or more operations depending on the implementation of planned activities • Organization of trade missions/trade fairs • Organization of export road shows • Export related studies, surveys, data bas; web site
Confederation of Moroccan Enterprises	<ul style="list-style-type: none"> • Enterprise/investment promotion • Support to professional associations

⁷ Acceptable expenditures : office equipment ; web site development, development of brochures/promotional materials

⁸ Acceptable expenditures: trade fair participation; prospecting markets ; market studies ; studies on conditions for establishing distribution networks abroad ; invitation of foreign buyers ; promotional events

Institutions	Programme priorities, activities and support measures
(CGEM)	<ul style="list-style-type: none"> • SME promotion related events • Awareness building/support regarding export consortia
Textile & Clothing Association (AMITH)	<ul style="list-style-type: none"> • Support to consortia establishment and management • Support Fund to consortia in textile sector (1000 000 DH) • Organization of Road Show including awareness on consortia • Creation of « Pôle Consortium », web site
Moroccan Export Assurance Company (SMAEX)	<ul style="list-style-type: none"> • Specific incentives/preferential tariffs for consortia as regards insurance covering proportion of expenditures engaged in market prospection /trade fair participation
Maison de l'Artisan	<ul style="list-style-type: none"> • Advice/support to artisans • Market prospection • Production adaptation in line with market demand/requirements
Enterprise Support Programme (PAE)	<ul style="list-style-type: none"> • Support to upgrading/modernization of at least 500 manufacturing enterprises (2004-2008) • Assistance in field of quality/normalization • Support Fund of 400 MDH (of which 50% covered by UE funding) aimed at financing of investment projects and Moroccan technical assistance
Support Programme for Professional Associations (PAAP)	<ul style="list-style-type: none"> • Strengthening of capacities of professional associations/members • Support Fund (€7.149 million): <ul style="list-style-type: none"> <input type="checkbox"/> 70 % of investment/services <input type="checkbox"/> 70% of staff expenditures (year 1) <input type="checkbox"/> 50 % des staff expenditures (year 2)

2.3 UN Development Assistance Framework (UNDAF)

The UN System in Morocco is engaged in a process of co-operative programming within the UNDAF framework, aimed at fostering collaborative UN actions in the country in support of Morocco's national priorities, as reflected in the country's Millennium Development Goals (MDG) and National Human Development Initiative (INDH).

The current UNDAF covers the period 2007-2011. UNIDO is positioned with respect to a number of UNDAF priority areas for cooperation, such as pertaining to income generation, access to relevant services, food security, gender mainstreaming and women entrepreneurship. It is noted that the current UNDAF strategy does not explicitly include among its focus areas themes such as export development and enterprise upgrading. However, support to the productive sector through the projects under review is considered coherent with the government's priority areas of economic growth, employment creation and poverty reduction that have guided the UNDAF framework.

3

Planning, design and strategy of the intervention

3.1 Project identification

The first project to support the creation of export consortia in Morocco (project UE/MOR/04/127; phase 1) has been developed (i) inspired by UNIDO's technical cooperation in the field of export consortia in the sub-region, namely in Tunisia and (ii) building on a pilot experience in Morocco itself, covering UNIDO support to enterprise networking in the area of handicrafts (marquetry and pottery), both funded by Italy. Through a seminar organized in April 2002 in Rabat by UNIDO in cooperation with the then Ministry of Trade and Industry, information was shared with local stakeholders on experiences as regards export consortia in countries of the Mediterranean region. The local Committee in charge of the follow-up of this first seminar recommended, as a first step, an assessment to which extent and in which sectors Moroccan enterprises would be interested in creating export consortia. The idea was to stimulate the creation of "pilot consortia" and develop, based thereon, a national export consortia strategy. This became the subject of the first request made to UNIDO, resulting in the development of the first project (phase 1; 2004-2007). Based on the results of the first phase, an extension was requested to and approved by the donor, allowing for the continuation and consolidation of the efforts undertaken. This second phase (project UE/MOR/07/007) started in January 2008 and will run up to end 2010.

The intervention is integral part of UNIDO's subsequent Integrated Programmes (IP) in Morocco: support to export consortia (phase 1) was actually added to the first IP (2000-2004), as the initial IP had been already formulated in 1998 and is included in the second IP that was launched in May 2007.

3.2 Project design and funding

The project documents covering the two subsequent phases are similar. Table 4 below provides a summary overview of the project structure as defined in the project documents.

Table 4 Snapshot overview of the project structure (phase 1 and phase 2)

<i>Phase 1</i>			<i>Phase 2</i>		
UE/MOR/04/127: Support to the creation of export consortia			UE/MOR/07/007: Strengthening of national capacities to promote and support export consortia		
Planned duration: 3 years (2004/05/06)	Actual duration: 4 years (2004/05/06/07)		Planned duration: 3 years (2008/09/10)	Starting date: January 2008	
Chief Counterpart Agency: Ministry of Commerce, Industry, Energy and Mining	Associated Partners: Association of Moroccan Exporters (ASMEX), Moroccan Export Promotion Centre (CMPE), Federation of Chambers of Commerce, Industry and Services (FCCIS), and Sector Associations		Chief Counterpart Agency: Ministry of Foreign Trade ⁹	Associated Partners: Association of Moroccan Exporters (ASMEX), Moroccan Export Promotion Centre (CMPE), Moroccan Agency for SME Promotion (ANPME)	
Expected results	Activities	Indicators	Expected results	Activities	Indicators
1. Enterprises interested in creating alliances (export consortia) identified	- Sensitize enterprises across the country	Inventory of interest of enterprises; list of interested enterprises	1. Sectoral, geographic and institutional widening of the project	- Sensitize priority sectors with export potential and priority regions - Involve relevant institutions and sector associations - Develop and implement a communication strategy - Organize awareness building events and identify enterprises interested in forming consortia	At least 400 enterprises reached by awareness building activities, covering at least 10 sectors and 5 regions (other than Casablanca)
2. At least 3 – 4 consortia created	- Support enterprises in process of formal consortium establishment and elaboration of business plan - Support consortia in implementation of Business plan (internal	Consortia formally established and business plans formulated Implementation of business plans initiated and contact with future distribution networks	2. Consolidation of 17 existing consortia and creation of 10 new ones	- Support enterprises in the formation of consortia, definition of joint actions and their implementation	10 new consortia created and existing consortia developed measured by promotional activities organized, internal organization and link with foreign contractors/buyers

⁹ At the beginning of the project there was a single Ministry (Ministère du Commerce, de l'Industrie et de l'Artisanat); thereafter the Government split this Ministry into three different Ministries, among which the Ministry of Foreign Trade (which became the main counterpart of the export consortia project).

Phase 1			Phase 2		
UE/MOR/04/127: Support to the creation of export consortia			UE/MOR/07/007: Strengthening of national capacities to promote and support export consortia		
Planned duration: 3 years (2004/05/06)	Actual duration: 4 years (2004/05/06/07)		Planned duration: 3 years (2008/09/10)	Starting date: January 2008	
Chief Counterpart Agency: Ministry of Commerce, Industry, Energy and Mining	Associated Partners: Association of Moroccan Exporters (ASMEX), Moroccan Export Promotion Centre (CMPE), Federation of Chambers of Commerce, Industry and Services (FCCIS), and Sector Associations		Chief Counterpart Agency: Ministry of Foreign Trade ⁹	Associated Partners: Association of Moroccan Exporters (ASMEX), Moroccan Export Promotion Centre (CMPE), Moroccan Agency for SME Promotion (ANPME)	
Expected results	Activities	Indicators	Expected results	Activities	Indicators
	organization; communication strategy/tools; contacts with distribution networks; participation in well targeted trade fairs)	established			
3. Consortia facilitators/ brokers trained	-Identify and train staff of public/private support institutions/consultants -Consolidate/adapt tools as required	2 training seminars organized with at least 8 participants in each event	3. Team of 50 consortia facilitators/brokers trained	-Train staff of public ad private support institutions -Develop and adapt where needed the tools used by facilitators/brokers and by the consortia members to analyse consortium performance	50 facilitators/brokers trained of which 20 take actively part in support to export consortia as part of their regular activities
4. Specific support measures for consortia proposed to the authorities	-Provide advice to Moroccan authorities based on experience of Italy -consult with consortia on expectations regarding specific legal status/incentives	Recommendations submitted for approval; new support measures	4. Incentives put in place and legal framework improved	-Support the implementation/refinement of support measures (in particular the Support Fund dedicated to export consortia) -Assist in the definition of a specific legal framework for export consortia	Support fund used (90%) Extension of support incentives applicable to individual exporters to export consortia Specific legal status for export consortia

As regards the funding, Table 5 below gives an overview of the budgets of the two phases, including also expenditures to date. It is to be noted that, concerning Phase 2, the donor has made the first instalment payment (out of two payments).

Table 5 Overview of project funding and expenditures

Project/ phase	planned (€)	expenditures (€)	% spent	balance (€)
Total	714,402	354,974	49.7	359,428
of which:				
Phase 1 <i>UE/MOR/04/127</i>	209,036	208,016	99.5	1,020 (closed)
Phase 2 <i>UE/MOR/07/007</i>	505,366	Instalments 1 and 2		
of which: <i>first instalment</i>	309,735	146,958 ¹⁰	47.4 (of first instalment)	162,777

3.3 Strategy

The implementation strategy is based on the following interrelated pillars:

- Awareness building as regards the concept and sharing information on experiences, targeting enterprises and support institutions (public/private), with concern for sectoral and geographic outreach;
- Support to export consortia in the process of constitution and start-up;
- Public and private support capacity building to foster the creation and development of export consortia, using and adapting available tools and experiences;
- Support to the development of incentives/improvements in the regulatory environment specifically targeting export consortia.

The approach reflects UNIDO's experience in the field of enterprise networking/export consortia in developing countries, making also intensively use of the experience gained by Italy in this regard. This entails using available expertise and practical tools and adapting the latter to the country context.

"Pilot" export consortia cases play a central role in the intervention logic: they are considered a source of learning on what works/what does not work, which policies and

¹⁰ As at early November 2008

which services are needed. Also, based on success stories, pilot cases are expected to have a demonstration effect and thus stimulate the creation of new consortia.

The principle of sustainability is addressed by putting emphasis on training a team of facilitators/brokers within public and private support institutions, including also private consultants.

3.4 Conclusions on project design

Implemented with the context of the first and second UNIDO Integrated Programme for Morocco (IP 1 and IP 2), the way in which the UNIDO support to export consortia was designed has been and continues to be in line with Government priorities as regards the competitiveness of Morocco's industrial sector and export development. The design of the first phase described the rationale of the assistance and role of UNIDO, with the design of the second phase building on the achievements in the first phase. In terms of strategy and logic, the two phases follow a similar design pattern. It is to be noted that as regards the logical framework, the second phase document is more refined, as more specific on indicators/success criteria and also including assumptions regarding conditions external to the project. There is more emphasis on output indicators than outcome indicators in the logical framework.

Changes in the institutional environment were taken into consideration in the second phase, such as the inclusion of the newly created SME Promotion Agency (ANPME) among the core partners. The approach to focus on a selected number of core partners associated in project steering rather than including a wide range of partner institutions was appropriate. The balance of public and private partners is in line with the public-private partnership principle actively applied in Morocco.

The project documents do not describe explicitly the baseline situation of Morocco's exports and the country focus in this respect (export performance, its evolution of past decade, main factors hampering its development, existing competitiveness enhancement/export development strategies)¹¹. Compared to the first phase, the project document of the second phase is more explicit on monitoring aspects, as the latter foresees the establishment of a monitoring system (to be set up as of the start of the project) to measure performance and impact and thus guide project operations.

No explicit linkage was envisaged in the design with other components/projects within the context of the UNIDO IP. Nor was active cooperation and collaboration with other donor supported projects in fields such as export promotion, enterprise upgrading, association building envisaged in the design.

Taking into consideration that the second phase covers the consolidation of the efforts under phase 1, the design of this second phase could have been more explicit on the exit strategy.

¹¹ Subsequent reports prepared during project implementation however contain relevant information on export performance and trends.

4

Implementation

4.1 Achievements

This section describes the achievements under the outputs compared to the planned activities. As the structure of phases 1 and 2 are similar, the achievements of the project will be presented in a consolidated manner, under the following headings: (i) results to date in terms of consortia created/under creation/preparation and their characteristics, (ii) realized activities pertaining to awareness building, training and coaching, and (iii) efforts undertaken and results as regards support measures to foster the creation and development of export consortia.

(i) Consortia creation

As at October 2008, the situation as regards consortium creation is as follows: a total of 15 export consortia exist formally, 3 are about to be created and another 6 are in different stages of preparation. Table 6 below summarizes the status to date, distinguishing between the two phases and specifying also the sectors covered as this stage.

Table 6 Overview of export consortium creation to date

Stage of development	End of Phase 1	Total of Phase 1 and Phase 2 to date
<i>Consortia legally established</i>	10 5 - Textile/clothing 2 - Food processing 1 - Tourism 1 - Building materials 1 - Electricity	15 6 - Textile/clothing 4 - Food processing 1 - Tourism 1 - Building materials 1 - Electricity 1 - Mecatronics 1 - Leather/leather goods
<i>Consortia in process of formal establishment</i>	7	3 1 - Shoemaking 1 - Food processing 1 - Textile/clothing
<i>Consortia under preparation/reorganization</i>	4	6 1 - Textile/clothing 1 - Automotive components 2 - Mechanics/metallurgy 1 - IT 1 - Engineering
<i>Total</i>	21	24

The matrix shows the trend in quantitative terms and also illustrates the gradual sectoral diversification (one of the issues raised based on the phase 1 experience that is being addressed in phase 2).

Regional diversification has also been among the priorities. In this respect, in phase 1 there was a certain concentration of consortia in Casablanca (7 out of 10 consortia), the other ones being created in respectively Rabat (1), Essaouira (1) and Taroudant (1). Phase 2 to date shows a gradual regional diversification as regards the 15 consortia created so far: Greater Casablanca (9), Rabat (1), Fez (1), Essaouira (1), Agadir (1), Taroudant (1) and Tiznit (1).

Further characteristics of the consortia created include: ¹²

- the number of enterprises that constitute an export consortium: adherence to the group varies from 3 to 7 enterprises (with one exception, namely a case of 22 member-cooperatives of a consortium in the food processing sector);
- the relatively young age of the business executives: this is a feature the evaluation mission observed as regards the consortia leaders met; it reflects openness to a 'different way of doing business' in today's world faced by fierce competition;
- a varying degree of "export readiness", as covering a mixture of enterprises, some having prior direct export experience and others not having exported so far at the moment of consortium creation;
- the blend of different sizes of enterprise engaged in such alliances: the portfolio of consortia covers mainly the ones bringing together medium-size enterprises and even a few large enterprises, but also several consortia of small enterprises; whereas there is a mix of horizontally and vertically linked enterprises, vertical alliances appear to dominate;
- the fact that most consortia are relatively recently created: the majority formally exists since 2 years or less;
- variations in terms of day-to-day management: 11 out of the 15 consortia created have a director (sometimes also called coordinator), and 2 out of the 11 are working for the consortium on a part time basis;
- alliances are for now mainly focused on sharing promotional, logistical and upgrading related costs (promotional consortia) rather than on joint organization of members' exports (sales consortia), even though, with time, consortia may decide to move from joint promotion to joint sales;
- the current consortia constitute a mix of complementary and competing firms working in the same or inter-related sectors.

¹² The evaluation team has no access to data allowing for comparison of these characteristics with experiences elsewhere.

At the request of the evaluation team, the project team prepared a detailed matrix providing a snapshot overview on the current consortia. This matrix is included as Annex F.

(ii) Awareness building, training and coaching

Since its start (phase 1), the project has both undertaken and taken part in a range of sensitization efforts, aimed at sharing information on the concept of export consortia, using as illustrations experiences elsewhere, and, as time went by, in Morocco itself. These awareness building initiatives (that continue to date) have covered:

- targeted discussions with professional associations, with enterprises and with support institutions;
- seminars in Morocco organized by the project together with project partners as well as participation of the project team in relevant events such as “road shows” organized by others (at the national, regional, local level and including both multi-sectoral and sector-specific events);
- exposure to other experiences, such as through the organization of study tours for institutional partners and enterprises and through inter-country exchanges (expert group meetings, the most recent one being held in Morocco itself in may 2007).

Moreover, the project has organized a first training targeted at in particular consortium facilitators during phase 1 (October 2004) and recently launched a second series of such trainings under phase 2. The latter started in Rabat (October 2008) and will subsequently be organized in different regions of the country, aimed at reaching out each time to a group of some 30 participants from both the public and private sector.

Annex G contains a list of the main exposure/training activities conducted so far. The list does not claim to be complete but illustrates the range of sensitization efforts directly organized by the project.

Of utmost importance has been the sustained effort at the level of enterprises, one to one and as a group, sensitizing them to the idea of creating export alliances and coaching them step by step in the process from initial interest in working together, formal creation of an export consortium, preparing a business plan to actually undertaking joint activities.

Finally, there has been joint learning among enterprises within the consortia as well as to some extent among consortia, facilitated through the launching of periodic inter-consortia meetings on themes common to the different groups.

(iii) Support measures

The project team provided an active contribution to the design of measures (such as the Support Fund), together with the project’s local partner institutions and led by the Ministry of Foreign Trade as main counterpart of the project. This has resulted in a number of achievements, in particular:

Incentives and other indications of local anchorage of the concept

➤ establishment of a specific support fund for export consortia by the Ministry of Foreign Trade ¹³: this fund, set up in 2006 and operational since 2007, is dedicated to cost-sharing (50%) in start-up expenditures of consortia (up to a ceiling of 100,000 DH), complemented by subsidies for promotional actions during the first three years of an export consortium at a decreasing rate (75% in year 1; 60% in year 2; and 50% in year 3), and with a ceiling of up to 200,000 DH for each of the 3 years. The management of the fund is entrusted to the Moroccan Exporters Association (an illustration of public-private partnership). The Fund's Management Board is chaired by the Ministry of Foreign Trade and has as members a representative of the Moroccan Exporters Association, of the Moroccan Export Promotion Centre and of the National Agency for SME Promotion (the UNIDO project takes part in the Board meetings as observer);

➤ decision by a range of support institutions (based on their role in the UNIDO project) to give preferential treatment to export consortia as regards access conditions of their respective export development related support schemes, namely:

(a) total of 85% cost-sharing for a consortium participating in the programmes offered by the Moroccan Export Promotion Centre (mainly covering trade fairs but also possibility for cost-sharing targeted services such as market surveys), compared to 70% to individual enterprises;

(b) possibility of funding business support services (collective actions) by the National Agency for SME Promotion to groups of enterprises interested in creating an export consortium or to existing consortia (such as business plan preparation; development of an export strategy; joint staff training; development of integrated information system; process optimization; coaching towards certification; promotion of overseas business linkages);

(c) eligibility of export consortia to the services offered by the Moroccan Export Insurance Company (transaction insurance; risks involved in attempts to develop new markets, ...), at a negotiable preferential rate compared to the rate applied to individual enterprises.

➤ inclusion of the concept among the priorities and action plans of private sector organizations, such as:

(a) the textiles and clothing business membership association (AMITH, representing a sector that accounts for about 25% of total exports): this organization has explicitly included export consortia in its industrial strategy focus area and organizes events to promote the concept among its member enterprises. AMITH has allocated an amount of 1 million DH (from a government supported textile sector revitalization plan totalling 20 million DH) which is reserved for

¹³ Funded from tax revenues on imports; the fund is said to be "open" (no specific ceiling is set as regards the size of the fund).

support to export consortia in the textile sector. It is to be noted that the level of involvement of other sector associations is not yet that strong;

(b) the Federation of Moroccan Enterprises (CGEM), in particular through its SME Committee: this apex body has recognized the importance of the approach for Moroccan enterprises to be able to compete and is among the support institutions (public and private) that, together, foster export consortia creation.

Legal framework

In the absence of a legal structure specifically for export consortia (as is the case in Italy), in Morocco - just as in other countries of the region - , the *Groupement d'Intérêt Economique* (GIE) formula was chosen as the most appropriate legal form for export consortia. However, as enterprises continue to raise questions on certain legal and fiscal aspects of the GIE that were considered a limitation (such as regarding joint responsibility and value added tax -VAT- duties), the project commissioned a study conducted by a Moroccan accountancy expert to analyse these issues, the results of which were presented to the enterprises at an inter-consortium meeting (December 2007). Discussions on legal and fiscal aspects of consortia continue to date, with consortia claiming a legal base specific to such alliances of individual enterprises, fiscal advantages (VAT; customs) and privileges in terms of access to foreign currency to finance consortia related business trips abroad.

4.2 Project execution

The above achievements reflect the result of the combined work of (a) the project core team (so far essentially two international experts – one based in Morocco and one carrying out periodic return missions – and one national expert focused on field work with the enterprises and support institutions); (b) the core project partner institutions in Morocco involved in the implementation and steering of the project, supported by (c) HQ based project managers and (d) the UNIDO Office in Morocco.

The project core team has its base in the UNIDO Office in Rabat and works on a day-to-day basis with local partner institutions and existing/emerging consortia. It is to be emphasized that they focus on providing catalytic “soft” support, stimulating changes in ‘the way of doing business’ by individual enterprises, as well as advising on policy level support to the creation and development of export consortia.

In terms of budget, the break down of expenditures of the first phase is summarized in Table 7 below, showing the relative weight of national expertise. Actual expenditures were found to be in line with the planned budget allocation.

It is considered premature to look at the breakdown of phase 2 expenditures, as that project phase has not yet completed its first year. In terms of the planned budget as per the project document (€505,366), the following breakdown is envisaged: international expertise (25%), national expertise (43.3%), training (15%), and the remainder covering mainly travel and miscellaneous expenditures. Attention is drawn to the reduced international expertise input

(which indicates a gradual decrease in missions related to monitoring and training activities) and the increase in the training budget (covering local costs involved in training activities conducted largely by the project team based in Morocco together with the Moroccan project partners).

Table 7 Composition of planned budget/expenditures (phase 1)

Type of input	Planned budget (€)	Planned budget (%)	Actual expenditure (%)
International expertise	78,925	37.8	37.9
National expertise	90,526	43.3	43.2
Training	21,885	10.5	9.8
Other (HQ/local travel; miscellaneous sundries)	17,700	8.5	9.1
Total	209,036	100%	100%

5

Assessment based on evaluation criteria

5.1 Relevance and ownership

In this regard, the assessment tries to answer a number of questions:

Does the intervention correctly address the priorities and plans of the country?

The project (phases 1 and 2) is clearly in line with the priorities and strategies of the Government of Morocco. Export promotion is among the core elements of the country's vision to foster economic growth and generate revenues and jobs. In this regard, the intervention is coherent with a number of complementary strategies and plans, in particular:

- The “*Plan Emergence*” launched in 2006, covering an industrial reform programme focused on enhancing competitiveness through enterprise modernization (upgrading), reforms in the business environment including export incentives, and infrastructural improvements, and targeting a number of sectors with growth potential;
- The National Human Development Initiative (Action Plan 2005-2010) which includes emphasis on stimulating income-generation as one of the pillars of reducing unemployment, poverty and social exclusion.

The country's socio-economic plans attach key importance to the development of the manufacturing sector, which faces growing international competition and seeks to identify niche markets. Efforts to support the manufacturing sector in overcoming weaknesses related to productivity, factor costs, management etc. are thus relevant, with a view to enhancing competitiveness, generating employment and also saving employment in a context of fierce international competition.

It is to be noted that Morocco is actively engaged in fostering the country's integration into the global economy, in particular through the different free trade agreements signed with a number of individual countries and groups of countries (cf. Section 2.1).

The UNIDO support to the development of export consortia can be considered *one* of the instruments on the range of needs and priorities of the country to reach its socio-economic targets. The approach is not purely to be seen as a tool to boost exports but equally important to encourage enterprise upgrading, which is a necessary ingredient of export readiness.

To what extent is the approach in line with the priorities of enterprises?

The project experience to far has shown that enterprises of different size (large-medium-small) realize that it is difficult to compete in an economy that opens up, when acting in isolation. Whereas high import tariffs have shielded Moroccan enterprises from competition for many years, trade liberalization forces them to improve competitiveness. The project reports and interviews of the evaluators indicate that enterprises more and more recognize the strategic importance of working together to face competition/seize export opportunities, particularly for SMEs which constitute the vast majority of enterprises. This does not take away typical difficulties in overcoming reluctance to form an association with other companies, including local competitors. The concept is new in Morocco and the process of consortium creation takes time, as eventual distrust among enterprises needs to be overcome and the ambitions to be distilled as a group need to be realistic and realisable.

Have there been similar attempts to create export consortia, prior to the UNIDO support?

In the interviews with some enterprises, it was learned that there have been cases of previous enterprise driven attempts to work together, even if not labelled 'export consortia', that however remained nascent. Also, it was mentioned that, in the case of exports of fresh fruits and vegetables, there is a platform which unites exporters. This being said, the importance of the role of UNIDO to broker inter-firm alliances was explicitly highlighted by all parties interviewed. The need for an 'outsider' to encourage enterprises to start to consider an alliance was recognized. In other words, the presence of a catalyst (the UNIDO intervention) to encourage and support the process appears to have been an important ingredient for bringing about both inter-enterprise linkages and collaborative efforts among support institutions to foster such linkages.

To what extent have local partner organizations been involved in the design and implementation of the project?

Starting from the design of the first phase, the local project partners, led by the Ministry of Foreign Trade, have been actively involved in the project. Convinced by initial information on the approach using experiences elsewhere (the seminar in 2002), the Moroccan partners requested UNIDO assistance in introducing the export consortium concept in Morocco. Local partner involvement throughout the implementation process is shown by the way in which different partners have started to internalize the concept by putting in place measures and activities focused on the promotion of export consortia, applying the principle of public-private partnership. Stakeholder participation has been high, even if, as regards the ones closest to enterprises - business membership organizations -, the record is mixed: apart from the very active role of the textiles and clothing association (AMITH), other sector associations have not yet started to play a front line role to encourage their members in creating alliances.

What can be said about the relevance of the approach within the context of UNIDO's work in Morocco including the UN-wide cooperation framework (UNDAF)?

The intervention is relevant from the perspective of UNIDO, as it concerns support at the cross-road of private sector development and trade capacity building. Export consortia support has been included as one of the sub-components of both the first and second Integrated Programme in Morocco and has allowed for cooperation with other sub-components. Special reference is to be made in this respect to the investment promotion sub-component – also funded by Italy – under which four consortia have benefited from promotional activities aimed at fostering business partnerships (with focus on Italy and France). Discussions are under way on how to apply the concept of enterprise alliances to other activities of UNIDO in Morocco, in particular at the level of value addition in the field of food processing in rural areas.

As regards UNDAF, as indicated in section 2.3, the project under review is not explicitly part of the matrix of priorities guiding UNDAF. This does not take away that the intervention is aligned to the priorities that underpin this cooperation framework, namely the country's socio-economic priority areas.

Have lessons learned from similar experiences elsewhere been used?

Support to export consortia creation and development has benefited and continues to benefit from similar experiences elsewhere, in particular in Italy (through the expertise provided through the project as well as through exposure tours). In addition, UNIDO tools for export consortia development, designed under previous projects elsewhere, have been adapted to the Moroccan context. Morocco has also benefited from relevant experiences in other countries of the region, facilitated inter alia by exchanges through periodically held expert group meetings (the first one in Italy in 2005; the second one in Morocco in 2007) as well as the country's participation in the Global Training Programme on Export Consortia (held so far annually since 2006 at the ILO International Training Centre in Turin, Italy).

Based on the experience meanwhile gained in Morocco in the field of export consortia, the country itself has started to interest other countries, in particular in West-Africa, allowing for South-South learning opportunities.

Has the approach adopted in phase 2 changed compared to phase 1?

Zooming in on the evolution of the approach comparing the two phases of the project, the strategy is similar, with emphasis on widening the geographical and sectoral outreach of support interventions in the second (ongoing) phase. Regarding the implementation strategy, the design of the second phase would have needed a more explicit exit approach, which is considered a gap to be addressed in this consolidation stage which started early 2008.¹⁴

¹⁴ Based on the comment received that the evaluation mission did not give a precise answer to the question pertaining to the exit strategy to be adopted, there are two points to be highlighted: first, mapping of the details of the strategy to phase out the role of the project and to ensure continuation of support beyond the project is not considered a task of the evaluation team as such; secondly, the evaluation mission makes a number of recommendations (cf. Chapter 5) aimed at contributing to the discussions in Morocco on the ways and means to ensure that assistance to export consortia will continue beyond the project. In addition to the question of funding, this also involves the issue of consortium brokers, considered too few in number and to be increased. To this end the mission has recommended that the project gives due attention to the selection and training of brokers (including on the job) and adopts a more focused approach in overall training activities.

5.2 Efficiency

The question addressed here is: *How well were the resources/inputs (funds; expertise; time) transformed into the intended results in terms of quantity, quality and timeliness? In other words: were things done right?*

A number of strong points need to be highlighted in this respect:

Expertise

Notwithstanding some challenges at the start to find the right national expertise, the team put in place was very motivated, competent, consisting of experts with complementary roles and working as a true team, guided in turn by a supportive UNIDO HQ based team. The expertise and commitment was highly appreciated by both enterprises and partner institutions, which has stimulated the active involvement of the core project partners and enhanced outreach of interventions to involve additional partners.

The day to day field work “on the ground” (at the level of the enterprises and support institutions) of the main national expert merits special attention. His profile and personality (vast experience in industry in different management capacities, ability to steer group dynamics, perseverance, availability, confidentiality, patience, etc.) were highly appreciated by all parties concerned.

The enterprises were also appreciative of the international expertise mobilized through the project, which has facilitated understanding of the concept of export consortia and learning from similar experiences elsewhere, including in Italy. The utilization of international expertise was appropriate, characterized by more intense support (country visits) at the start and less frequent monitoring cum advisory missions later on, of the consortium consultant. Moreover, an international expert managed and continues to manage the day-to-day project operations in Morocco, working in tandem with the national expert. There was found to be a very good team spirit both among the different experts in carrying out their complementary roles and with the range of local partner organizations.

Budget

The project illustrates that this type of intervention does not require mega budgets. Phase 1 covered 4 years and total of about €200 000 (cf. section 4.2 for further details on the structure of expenditures). Counterpart inputs were put in place and exceeded expectations: staff designated in each of the core partner institutions as well as the establishment of a Support Fund dedicated to the promotion and development of export consortia.

Time

The start-up of phase 1 took longer than expected and, overall, the duration of phase 1 was 4 rather than 3 years. As such, this is not considered problematic, based on the understanding that the concept was new and that creating business alliances takes time. Experience has shown that the time between an intention of creating a consortium and its actual constitution may well be

beyond one year. It is a process that cannot be rushed, for the sake of creating alliances that are solid, driven by its members and will sustain over time.

Synergies

An effort was made to link the intervention with other projects funded under the Integrated Programme. This was the case of the Investment Promotion Unit that included 4 consortia in its portfolio and funded a study tour to Italy in which consortia members participated. Partnerships were also pursued with other support programmes with a view to making consortia benefit from assistance offered through existing « support windows » in Morocco. Still, there remains ample scope for creating more effective synergies with other initiatives (levering other donor resources).

Notwithstanding the above assessment on project efficiency, there are a number of points that could be further improved in the “way of doing things” during the remainder of the project, described below.

Brokers

First, the hands-on experience gained in Morocco in fostering business alliances among existing/emerging/potential exporters has remained over the years too concentrated at the level of one person, i.e., UNIDO's national expert and a larger group of consortium brokers is needed. The recent recruitment of a second (part time) national expert for the Southern region is a step in the right direction, but will not be sufficient, considering the ambition to widen geographic and sector outreach of support to the development of export consortia. The objective of the project to train some 50 “animateurs” (cf. project document) seems however overambitious and calls for precision, as a distinction is needed between agents in support institutions engaged in promoting the concept (facilitators) versus the persons engaged in an often lengthy process of brokering among interested enterprises (brokers). De facto, the 50 persons targeted to be trained are to be considered facilitators within the main support institutions at the national/regional level.

Performance monitoring

The monitoring system needs refinement, in order to be able to measure progress against baseline data on the consortia/their members using relevant indicators and to assess overall results and impact of project interventions. Information is spread over periodic progress reports, but there is no data base system in place yet that allows for quick overview of up to date information on the performance of the portfolio of consortia created/under preparation.

The case studies conducted of 3 consortia cover mainly a qualitative assessment of results to date. This is a good start, but, ideally, such studies include more tangible information on the effects of the alliance and should also be the joint “product” of the project team and the consortium. Given the aim to generate demonstration cases and as each consortium is said to be a different experience, it would be relevant to have a detailed and quasi continuously updated picture of the evolution of *each* consortium.

Tools

There is abundant information on the approach (guides; manuals; studies), which has been shared by the project with project partners, including participants in subsequent training events. As there is such a wealth of information, the user may be overwhelmed. Therefore, depending on the role of the stakeholder (enterprise; support institution; broker; consortium manager), there may scope for extracting information (such as in the form of check lists; tips on what to do and what to avoid), customized to the target user.

Communication and cooperation

Whereas periodic inter-consortia meetings have taken place, the opportunity for consortia to exchange information and experiences has been somewhat underutilized. This applies to meetings among consortia operating in the same sector as well as multi-sectoral meetings.

Notwithstanding the efforts already undertaken to diffuse information on the concept through a range of channels, there is need to keep up and intensify this information sharing in the future, using the Moroccan experience gained in order to demonstrate that such business alliances *can* work in Morocco and generate tangible results for the SMEs engaged in such process.

Considering the range of support programmes in Morocco aimed at enterprise upgrading and export development, one would have expected to see more signs of effective cooperation with these projects and programmes in search of collective efficiencies, facilitated through the project partners.

Project Steering

The Steering Committee mechanism has been put in place but was not really operationalized in the first phase. This has improved in the second phase, as judged by the committee meeting minutes to the extent they were available. The work of the Steering Committee seems to be done often in conjunction with the meetings of the Board of the Support Fund. Whereas this is understandable from the point of view of time management, it is important for the Steering Committee to address the key issues at stake in this consolidation phase and possibly meet more often.

5.3 Effectiveness and impact

To what extent were the project results used? Where the right things done and what difference did the project results make in practice to the project partners and beneficiaries? What were the effects directly and indirectly?

In this regard, the following are the strong points of the project:

Awareness building

The range of awareness building activities undertaken by the project (seminars, study tours, participation in discussion fora) have generated interest and resulted in active involvement of the core project partners, which has greatly facilitated project implementation to date. The establishment of the Support Fund put in place by MCE with guidance of the project team, the support by AMITH dedicated to consortia, the incentives of CMPE, SMAEX and ANPME (cf. section 4.1) are all examples of this commitment.

The active use of pioneer consortia in awareness building and training activities organized by the project, thus providing hands-on testimonials of the experience and lessons learned in establishing export consortia, is considered a smart strategy adopted to spur interest of enterprises in such business alliances.

Consortia creation

The results in terms of consortia creation are encouraging and beyond expectations (compared to the project targets). At the end of the first year of phase 2 (combined with the results of the first phase), 15 consortia exist formally, 3 are in the process of formal establishment and another 6 are under preparation. The above covers the involvement of more than 130 enterprises of different sizes reached so far by the project interventions (cf. Section 4.1). The portfolio covers not only medium/large enterprises, but also examples of alliances of small enterprises (including cooperatives).

In terms of the potential for poverty reduction, no direct results were found so far, though a number of indirect effects are to be highlighted in this respect: skill development of unemployed through the apprenticeship programme introduced by some of the consortia; emphasis on CSR practices at the workplace.

Outreach

In line with the strategy of phase 2, there is an emerging geographic and sectoral diversification of the consortia created, as illustrated in Table 6 (cf. Section 4.1). The initial concentration of consortia creation in Greater Casablanca and in the textile sector in particular was not surprising, given the weight of industrial activities in this region and the importance of the textile sector for Morocco's exports. Yet the trend to cover more regions as well as more sectors is encouraging, to which explicit efforts of the project team and the project partners to expand awareness building and support have certainly contributed.

Vision of enterprises

It was observed that the participating enterprises have embraced the concept, which they often said to consider « the only way for Moroccan SMEs to be able to compete » in a complex and turbulent economic environment. The approach implies learning and internalising a new "culture" in the sense that it involves working together on both technical and organisational matters. Among the joint actions that were cited to have

started showing encouraging results (both at the level of the group as well as of the member-enterprises) were:

- Sharing of experiences among consortium members (intra consortium coaching)
- Different cost reduction/saving opportunities (sourcing)
- Collective training plans
- Joint promotion/marketing tools (brochures; web site)
- Joint participation in trade fairs or group representation by a few members
- Shared market studies/prospecting of markets
- Recognition of buyers that it is important to deal with a group rather than individual enterprises
- Indication of new business deals abroad for some members.

To illustrate, in the case of the consortium « FONOON » (which covers member-enterprises of different size), one of the enterprises which had no prior export experience obtained its first export order. In the case of the consortium « CHARM CONSORS », a joint unit has been set up, aimed at creating the group's own collections (moving away from dependency on purely sub- or co-contracting) as well as joint material sourcing. Table 8 below lists in more detail the type of joint actions undertaken so far by a few consortia.

Table 8 Illustration of joint actions by some consortia

Name	Members	Sector	Location	Actions realized or initiated
MOSAIC	INTERLINGE DOUNITEX CABILUX VETWEAR ATALANTE MAYA PULL	Clothing (vertical/ complementary)	Casablanca	<ul style="list-style-type: none"> • Brochure and web site • Market mission (prospection) <ul style="list-style-type: none"> ◦ New York (2004) • Trade missions <ul style="list-style-type: none"> ◦ UK and Spain (2005) ◦ Italy, Spain, Portugal and UK (2006) ◦ UK, Portugal and Spain (2007) • Trade Fairs <ul style="list-style-type: none"> ◦ Magic Show in Las Vegas (2005) ◦ Salon Euro Méditerranéen Fashion (2006) ◦ Maroc Sourcing -AMITH-Casablanca (2007) ◦ Fatex in Paris (April and November 2007) • Installation of information system (GPAO) • Restructuring of the work preparation system (Bureau d'études et de Méthodes) • Common purchases (supplies) • Collective negotiation of insurance tarification • Enterprise diagnostics • Establishment of training centre/trainees (centre de formation par d'apprentissage (CFA)) • Establishment of harmonized system for calculation of cost of production/minute
CHARM CONSORS	TWINS FASHION HANANE NARTEX EL FALAH	Clothing (vertical/ complementary)	Casablanca	<ul style="list-style-type: none"> • Brochure and web site • Trade missions <ul style="list-style-type: none"> ◦ Italy (June 2007) ◦ Germany (November 2007) • Trade Fairs <ul style="list-style-type: none"> ◦ Inter sélection in Paris (2005) ◦ Magic Show in Las Vegas (February 2006) ◦ Wwin Show in Las Vegas (November 2006) • Study concerning the establishment of a commercialisation structure in Spain • Establishment of a structure dedicated to the creation of own collections and sourcing of material inputs. • Search for sales representatives
FONOON	ATRETIS MAVELTEX RICHBOND	Home textile (horizontal/ competing)	Casablanca	<ul style="list-style-type: none"> • Brochure and web site • Market mission (prospection) <ul style="list-style-type: none"> ◦ Algeria (2005)

Name	Members	Sector	Location	Actions realized or initiated
	TISBROD CONTEXARA VASCO			<ul style="list-style-type: none"> • Market study (USA) by NBO • Trade missions <ul style="list-style-type: none"> ◦ Spain, France, Russia • Trade Fairs <ul style="list-style-type: none"> ◦ Heim textile in Frankfurt (2006 and 2007) ◦ Index i Dubai (2006) ◦ Evetks in Istanbul (2006) ◦ Morocco week organized by CMPE in Tripoli (2007) ◦ Décosit in Brussels (2007) • Purchase of stock surplus (intra-consortium)
LOOK AVENUE	Marisa BNA QUATRO KIRON TWO ONE	Clothing (vertical/ complementary)	Casablanca	<ul style="list-style-type: none"> • Brochure and web site • Trade missions <ul style="list-style-type: none"> ◦ Italy and Spain (2006) • <u>Trade fairs</u> <ul style="list-style-type: none"> ◦ Intersection in Paris (November 2005) ◦ Ready to show in Milan (2006) • Recruitment of stylist/modelist • Establishment of a show room (150m²) to display the collections of the member enterprises/to receive potential clients • Conclusion of agreement with sales representatives in Italie and UK • Common purchase of supplies • Common programme of technical assistance
TRAVEL PARTNERS	ACTIVE TRAVEL EVASION ON LINE L'ATELIER DU VOYAGE MOTIVATION & EVENTS NS VOYAGES ULYSSE VOYAGES VISIT MOROCCO	Tourism (horizontal/ competing)	Casablanca	<ul style="list-style-type: none"> • Market missions (prospection) <ul style="list-style-type: none"> ◦ UK, Sweden, Spain, Italy • Creation of consortium logo • Recruitment of part time director • Common purchase of inputs/supplies • Establishment of committee in charge of coordination of promotional actions and communication (brochure, web site, fairs) • Plan of joint training (staff ; personnel)

By acting as a group, promotional efforts abroad become affordable, especially for small enterprises that may not have the financial means to undertake such efforts individually. Several consortia have undertaken joint missions to prospect markets (such as to EU countries, USA, Turkey, Russia etc.), participated jointly in trade fairs (such as Index in Dubaï; Heimtextil in Frankfurt, Evtteks in Istanbul; Magic Show in Paris). The ability to reduce the cost burden of such actions on individual enterprises as a result of a group action is crucial.

The consortium has also become for many enterprises an exchange forum, such as regarding information on the price of raw material inputs, on dubious clients, on market trends etc. To illustrate, the consortium « Travel Partners » has created a *client black list* based on the experience of the group members.

At present, several enterprises are engaged in upgrading related activities (technical; managerial; organizational). Whereas these are not necessarily all group-based, it is to be noted that results achieved by one enterprise tend to encourage others to follow the same path. Or enterprises may “push” others in the group to introduce changes with a view to upgrading the group in view of efficiency enhancement, market requirements etc. (“tirer le group vers le haut”). Examples are : the creation of apprentice training centres within enterprises (Centres de formation par apprentissage, CFA), particularly by enterprises of the consortium MOSAIC); the adoption of the ‘Fibre Citoyenne’ label by a number of enterprises, reflecting the introduction of corporate social responsibility (CSR) principles regarding in particular labour conditions; the recruitment of a common designer. Several consortia consider the idea of aiming towards the production under a common brand/label (indicating interest in moving ultimately from promotional towards sales consortia).

Transfer of methodology, tools and experiences

The project interventions in Morocco could benefit from both upstream and technical cooperation activities conducted by UNIDO in the field of enterprise networking in general and export consortia in particular (inspired by the Italian experience in this field). In this context, the mission observed that the project has been good for the visibility of UNIDO as well as for Italy in the country.

Where required, they were adapted to the country context. To illustrate, the legal framework in Morocco is not the same as in Italy, which explains the choice for the *Groupement d’Intérêt Economique (GIE)* as the most suitable existing legal option for consortia in Morocco.

In turn, the Moroccan experience has started to interest other countries. Support institutions and consortia in Morocco have started to receive delegations from in particular West Africa (including Senegal) interested in the approach adopted in Morocco and what can be learned from this for their respective countries. Also UNIDO has fostered such learning opportunities among countries through the organization of expert group meetings, study tours and other occasions that allow for joint learning. For a list of the main training/exchange activities, reference is made to Annex G.

As regards the points for possible improvement, these are categorized as follows:

- Concerning the *regulatory and legal environment of export consortia* :

Support Fund

On the one hand, the process to release funds takes time, which may discourage enterprises to undertake joint activities that are often time bound (e.g. the participation in a particular trade fair). In addition, the eligibility criteria as regards allowable expenditures are considered rigid in the way in which they are spread over a three year period. As a result, consortia eligible to use the Fund have raised several questions on its operation. Slow utilization of the Fund could jeopardize the allocation of future funding of this type and in particular consortia of small enterprises would suffer, as they do not have the same means as larger enterprises to implement joint actions.

On the other hand, enterprises were not always aware of the procedures guiding the fund operations or simply did not follow them. To that end, the project has organized information sessions and assisted in the diffusion of a manual describing the steps, forms and other documentary obligations.

Taking into consideration that there are different schemes to subsidize promotional efforts (cf Section 2.2, Table 3), the Fund's Board is involved in ensuring proper coordination of "who pays for what", which is not necessarily a simple task.

Legal and fiscal framework

The issue of the appropriate legal status of consortia continues to be raised by enterprises, even if this is probably not a major obstacle to the creation of consortia. Enterprises look for an adaptation of the GIE formula as regards the degree of responsibility of GIE members, as well as fiscal exonerations (such as VAT, company tax, revenue tax).

There is a general claim for consortia to get the same (if not better) export related incentives compared to individual enterprises and be recognized as exporters. Reference has been made in this respect to the privileged treatment of consortia in Italy (where consortia have a separate legal status).

- Concerning *the guidance of consortia in their creation and development*:

It is to be noted that the concept is relatively new in Morocco and most consortia have been created rather recently. As the groups are in their start-up phase, they are considered still relatively fragile. Consortia members have mentioned the importance they attach to the project coach remaining an adviser to the group, even after "take off".

Notwithstanding the laudable efforts by the enterprises, the project and its partners so far, there is a need to sustain the assistance particularly in their critical start-up phase. This is crucial, as the ambition is to have solid demonstration cases that are followed by other enterprises, in particular SMEs. This involves guidance in their constitution (a process that can take time), assistance in the elaboration of the consortium's business plan, as well support in the launching of joint activities.

Inter-consortia exchanges have been initiated, but are to be intensified, both among consortia of enterprises of the same sector as well as those involving different sectors. The creation of more opportunities to share experiences and lessons and widen networking among enterprises is of essence.

To the extent that the approach is based on a “pilot logic”, there is scope for putting much more emphasis on analyzing and actively using the pilot case experiences in policy advice and training activities. More comprehensive case studies pertaining to the pilot consortia are needed, to serve as an important ingredient for the further development of export consortia related support policies/services as well as to stimulate the creation of new consortia.

Concerning awareness building, brokering/coaching and training:

The mission observed that the training activities organized by the project have similarities with awareness building, without a clear distinction between different roles: sensitization, brokering/coaching and consortium management. Each category needs a set of information and tools justifying a more precise categorization of who is trained in doing what.

In terms of awareness building, the main targets are the enterprises and their associations (cf. the experience at the level of AMITH). It is crucial to identify one or more enterprises that lead the process and whose vision incites other enterprises to join the group.

Within the spirit of mobilizing additional assistance for consortia and their members, deepening the link with related enterprise support that exists in Morocco is considered important. For example, stronger linkage of the project with ongoing programmes aimed at strengthening business associations (the case of PAAP) may be instrumental in deepening and widening the involvement of sector associations in project interventions. This is particularly the case if such complementary programmes cater to the strengthening of the services provided by these associations to actual/potential members. After all, professional associations are closest to enterprises and are in principle best placed to support business alliance efforts.

Together with the project team, staff from support institutions such as MCE, CMPE, ANPME, and others) are expected to multiply communication and awareness building efforts across the country and using the widest range of channels (enterprise visits, seminars, road shows, different media).

The current team involved in coaching is too small with regards to the ambitions of the project. Additional coaches are to be trained by the project and they can come from different backgrounds (public and/or private - including from existing consortia), provided having the right profile needed to help forge business alliances and manage group dynamics. Ultimately, it is this enhanced core team of local experts that will need to ensure that existing consortia and emerging consortia receive the support required to develop and grow.

5.4 Sustainability

The ultimate question is: *will the project results likely continue after the ending of external funding? What is the probability of continued longer-term benefits?*

With two more years to go in phase 2, the concern for sustainability is vital knowing that phase 2 is the consolidation phase. Already, the active involvement and commitment of the different project partners (public and private) illustrate the degree in which the approach is locally owned. Further sensitization and training during phase 2 will certainly facilitate the transfer of the skills and lessons learned. Moreover, the continuation of support to existing and new consortia with active involvement of the main local partners would contribute to the likelihood that the work continues beyond the end of the project.

There are a few concerns at this stage, as neither the phase 2 project document nor the 2008 work plan define in clear terms the exit strategy or the need for explicit decisions/steps in this direction. In this respect:

- It is not clear who will ensure the day-to-day coaching of the consortia after the project; many actors have been and continue to be sensitized, but who will play the crucial and time consuming role of guiding the enterprises in the process of formation and development of their consortium?
- There is need for putting more emphasis in this consolidation phase on transferring the know how of coaching ("savoir animer"), to ensure there is a core team of qualified and competent local actors that will continue the support to emerging and existing so far provided by project staff;
- There is need to examine how the coaches will be paid once the project ends and start discussion on the post-project situation, also as regards the funding of the support now covered by the project; this is both urgent and timely, also taking into consideration the recently approved Fund for the promotion of exports (500 millions DH for the period 2009/10). As the relevance of export consortia is recognized, this is the time to discuss with the Ministry of Foreign Trade which amount will be allocated to consortia, what the above fund can cover in terms of support to consortia development and what is the procedure to be followed;
- What can be done to get sector associations more actively involved in the process of supporting consortia ? So far mainly AMITH has played an important role yet how to reach similar commitment from other sector associations?

5.5 Summary of strengths and points for improvement

Based on the above analysis, the main conclusions on project performance (phases 1 and 2) are summarized in table 9 below.

Table 9 Overall assessment of project performance

Main strong points	Main points for improvement
<ul style="list-style-type: none"> • Relevance of the intervention • Active involvement of key local partners • Approach building on prior experience elsewhere, transferring know-how and tools • Wide range of awareness building/training activities with good outreach • Results exceeding expectations in terms of: consortia created; trend of geographic/sectoral diversification; range of enterprises involved (large, medium and also some small scale) and range of support instruments put in place by the GOM with guidance by the project • Motivation and competence of project team and appreciation by enterprises and partner institutions • Use of budget incl. balance of national and international expertise 	<ul style="list-style-type: none"> • Need for explicit exit strategy considering 2 years left in consolidation phase, guided by Project Steering Committee discussions and decisions • Scope for further improvements in the support environment when feasible by GOM and with guidance by the project (addressing rigidity of support fund; advice on legal and fiscal issues) • Need for more consortia brokers/coaches with required profile • Distinction between targets of training activities missing: (i)facilitators engaged in pursuing awareness building and identification of interest in consortia, (ii)consortium brokers/coaches and (iii) consortium managers • Weaknesses in performance monitoring system • Scope for more alliances with related interventions of GOM and other donors/agencies

6

Recommendations

A. Recommendations to UNIDO

1. The work plan for the period 2009/10 should include the preparation and discussion of the project's exit strategy that is to guide the activities the project will undertake in its remaining life span and to ensure the project's sustainability.
2. Taking into consideration that the existing consortia are relatively young, coaching by the project should be continued, in order for the consortia developed during the project life to become true models.
3. Efforts towards regional and sectoral diversification should be continued, involving existing networks of public and private organizations in the regions.
4. Emphasis should be placed on supporting a realistic number of model consortia (some 30 covering project phases 1 and 2), based on the principle that qualitative results are more important than maximizing the number of consortia supported. Moreover, in this consolidation phase, UNIDO support should gradually move away from direct support regarding consortium creation and development to a more indirect role aimed at providing policy advice and monitoring of interventions.
5. Efforts to reach out to small enterprises, encouraging them to engage in export related alliances with other enterprises, should continue to be actively pursued. They typically face more difficulties in exploring export market opportunities and have much to gain from joint actions.
6. Training activities in 2009/2010 (class room/on the job) should make a clear distinction between (i) staff of institutions expected to play a role as regards awareness building/sensitization of enterprises, (ii) brokers/coaches of consortia and (iii) coordinators/directors of consortia.
7. The number of brokers/coaches (carefully selected and trained) needs to increase, considering their crucial role in the process of consortia creation and development.
8. The exchange and sharing of experiences among consortia in Morocco should be intensified, both through inter-consortia meetings bringing together consortia operating in the same sector as well as through multi-sectoral inter-consortia meetings.
9. Where feasible, exchanges between Moroccan consortia and consortia elsewhere are to be fostered as source of learning and eventual collaboration.

10. The project team, together with its local institutional partners, should pursue discussions on ways and means of mobilizing additional support to existing and emerging export consortia. This also includes the deepening of operational linkages with related support programmes and projects (EU; USA; others), thus intensifying leveraging of other donor resources.

11. Project monitoring needs to be refined, with a data base on each consortium, starting with a good baseline situation and covering cumulative recording of activities undertaken including support provided. This should result in more precise measurement of quantitative and qualitative results of the enterprise alliances supported by the project. Even if it will not be always possible to attribute changes in enterprise (export) performance to the fact that enterprises have engaged in strategic cooperation through an export consortium, monitoring tools are to help assess the impact of the intervention, justify the use of funds and facilitate learning/demonstration effects. The concern for refined monitoring is to be addressed as part of the ongoing work to further develop the operational toolkit for measuring the performance of export consortia in the context of UNIDO's cooperation with an Italian Business School (ALTIS/Milan).

12. There is need for more case studies based on the "pilot consortia" experience, providing analysis of what worked and why (or not). These studies are to be actively used in training activities as well as in communication on project results through the media.

13. Taking into consideration the range of institutions involved in promoting the concept, there is scope for studying the opportunity for creating in Morocco an electronic platform hosting public information on relevant experiences (bench marking studies, tools, testimonials of Moroccan consortia...).

14. As export consortia are considered an instrument with possible direct and indirect effects on poverty reduction, UNIDO is encouraged to keep this concern in mind when identifying and coaching emerging and existing consortia in their joint actions. It is important to monitor how the joint actions affect the social environment in which consortia operate and what are the effects –positive/negative- on poverty reduction. Similarly, working with groups of enterprises is considered an appropriate channel for sensitizing enterprises to Corporate Social Responsibility (CSR) concerns and corresponding actions, also triggered by increasing demands of foreign buyers in this regard. To this end, the multiplication of initiatives already taken by a number of (members of) consortia, such as apprenticeship training and CSR labelling (*Fibre Citoyenne*) is to be encouraged and UNIDO will need to train its experts on available CSR methodology and tools.

B. Recommendations to the Government of Morocco

1. It is suggested that the Ministry of Foreign Trade starts a discussion, bringing together the different local partner institutions, on the modalities for funding of support to the creation and development of export consortia after 2010 (the end of the project).
2. In addition to pursuing the assistance to export consortia through the Support Fund set up in 2006 (covering funding of start-up activities of consortia), it should be studied to what extent a portion of the envisaged public funds to boost exports could be reserved for funding proposals emanating from local institutions to support export consortia in accordance with the methodology of the current UNIDO project.
3. To the extent that there remain obstacles/questions as regards the legal and fiscal framework pertaining to export consortia, the Ministry of Foreign Trade is encouraged to pursue its efforts, in collaboration with other Ministries, to streamline the regulatory environment for consortia where feasible and appropriate.
4. The Steering Committee of the Support Fund should assess the main bottlenecks affecting the speed of release of funds as well as possibilities for making fund allocation less rigid – in particular regarding the repartition of funds during the 3 years (without changing the basic principles of transparency and accountability). Smooth performance of the current first phase of the scheme is expected to facilitate the allocation of additional funding to the fund in future years.
5. The Ministry of Foreign Trade should ensure as chief counterpart of the project that the Project Steering Committee meets on a regular basis in the current phase of consolidation of project achievements. The discussions of the Steering Committee are to be based on periodic progress reports of the project team, containing information on the status of work plan implementation and on the budget situation.
6. The Ministry of Foreign Trade and other institutional partners of the project are encouraged to use the widest range of channels (including the media, such as TV programmes focused on debate of economic issues) to diffuse information on the concept and results achieved in terms of consortia creation and development, with a view to generating the intended demonstration effect.

C. Recommendations to the donor (Italy)

1. In order to ensure smooth implementation of the remainder of the phase 2 project and to avoid gaps affecting project operations, Italy should make available to UNIDO soonest the second and last allotment of the committed funding.
2. Through its participation in periodic local donor coordination meetings among EU member States, Italy could help foster cooperation between the export consortia project it finances through UNIDO and relevant programmes and projects in the field of enterprise upgrading/competitiveness enhancement funded by the EU and, bilaterally, by its member States.

7

Lessons learned

Based on the findings of the evaluation, a number of general lessons can be extracted from the project experience in Morocco, in particular:

- Evidence suggests that export consortia can be ‘created’, fostered by sustained awareness building and a step by step coaching of the group of enterprises interested in working together.
- Fostering cooperation among enterprises is not a quick and easy process and thus needs a time frame allowing for sensitization followed by coaching in the start-up phase. In this respect, export consortia projects do not need large scale budgets (which would generate the risk of funding activities that should rather be covered by enterprises themselves), but need adequate and continuous funding over a period, to ensure support in the different stages of consortium creation and development.
- A crucial ingredient for the achievement of project results is the commitment of the project partners -public and private- and their ability to influence decision making on support measures/activities, complementary to project activities and inputs, which affects overall project success.
- Each export consortium experience is different, as constituted by enterprises with different background and vision yet bundled by interest in engaging in joint actions.
- Considering the complexity of enterprise networking, it is advisable to start with promotional consortia and to only support consortia wishing to evolve into a sales consortium once the group is well established; when there is an “urgency” to sell together (depending on the nature of the consortium/market opportunities), it is important to avoid that the joint efforts are of a “one time” type and to ensure conditions for lasting joint sales.
- Ensuring that a consortium broker/coach has the right profile is pivotal, requiring features such as solid experience in industry, perseverance, confidentiality and ability to understand and steer group dynamics.

- As a specialized approach on the range of possible enterprise networking interventions, “export focus” can facilitate cooperation among enterprises and put seeds for wider enterprise networking activities (that are not necessarily limited to export promotion and development); in other words, export focus helps to pull firms together and can be the start of wider networking/cluster development activities.
- Export promotion and enterprise upgrading are very closely linked concepts; the export consortium logic does not have to be ‘stand alone’, but has a potentially relevant contribution to other types of UNIDO supported interventions (such as enterprise upgrading and sector development).
- The export consortium concept is not a purely competitiveness related instrument and both can and should have a link with pro-poor growth support interventions by stimulating collective actions that can have direct/indirect poverty reduction effects .
- A monitoring system needs to generate both quantitative and qualitative data to measure the performance and impact of, in this case, export consortia supported by UNIDO against baseline data pertaining to both enterprise members and the group; enhanced monitoring should include measurement of wider effects, i.e. on the social environment (workers; community; consumers).
- In case of a “pilot intervention logic”, project documents should explicitly indicate how the upscaling/replication process is planned; furthermore, during implementation it is crucial to analyse pilot cases and prepare case studies that throw light on good practices, extract lessons and serve as reference for policy makers and practitioners in the process of replication.
- The project document of a consolidation phase of project interventions should include an explicit exit strategy.

Annex A

Terms of Reference (Summary)

Independent Thematic Evaluation of the UNIDO Cluster and Networking Development Initiatives

I. Background and overview

Origin and context of Cluster and Networking Development (CND) Initiatives at UNIDO

UNIDO has been implementing technical assistance projects based on a cluster and network development approach since the mid 90s. The approach is built on the following four assumptions:

- That clustering and networking among enterprises promotes enterprise competitiveness,
- That public policy can help to facilitate clustering and networking,
- That clusters and networks contributes to pro-poor growth; and
- That initiatives targeting groups of enterprises are more cost-efficient and cost-effective than those targeting individual enterprises.

A fifth (albeit implicit) assumption is that UNIDO is competent and well equipped to promote cluster and networking development (CND). UNIDO has adopted or is about to adopt this approach as one of its strategies for contributing to the development of small- and medium-scale enterprises in developing countries, as a means of promoting sustainable and equitable growth. CND initiatives in UNIDO include export consortia.

The main driver of CND initiatives within UNIDO is the Cluster and Business Linkages Unit, which operates within UNIDO's Private Sector Development Branch. This unit implements technical assistance projects with an explicit Cluster and Networking approach. The main elements of the Unit's work are: Clusters; Networks, Export Consortia and Supplier Development ; Private Public Partnership; and Corporate Social Responsibility.

The CBL Unit implements CND mainly through the following lines of activities:

- Technical assistance projects:
 - Technical guidance and advice on project formulation, management, evaluation
 - Capacity building and training activities (training of trainers and training for final beneficiaries: entrepreneurs, BDS, policy makers, academia)
 - Operational tools (analysis, management, evaluation)
- Development of Methodologies, Manuals, Training Kits
- Expert Group Meetings and Joint Learning programs
- Global training courses (Turin) and regional ones

- Action-oriented research
- On-line Policy Tool Box

This thematic evaluation will focus on the work of the CBL Unit related to Clusters, Networks and Export Consortia, including the lines of activities listed above (i.e. projects and upstream work).

In addition to the projects with an explicit “Cluster” approach, a number of UNIDO projects use similar intervention methods, clustering groups of enterprises together and linking them with support institutions and public sector entities (e.g. SME project in Argentina, Energy efficiency in hand tool sector in India, Cleaner production projects applying “interactive learning” or “Eco-profit” methods in Colombia). The evaluation will also look into how far such initiatives are consistent with the “official” UNIDO CND approach and whether there is a potential to enhance performance of many interventions by making wider/better use of CND tools throughout UNIDO.

Evidence from project evaluations suggests that the UNIDO CND activities have good potential for up-scaling and continuous methodological development.

The objectives of UNIDO CND initiatives

UNIDO CND initiatives are implemented through technical cooperation projects. The objectives of these projects are defined in the corresponding project documents and they usually are defined in response to the specific country context. Hence, the objectives may differ from project to project in their concrete formulation. However, the UNIDO CBL unit formulated a set of expected outputs, outcomes and impacts, which are representative for all CND initiatives:

The assistance within UNIDO CND initiatives is delivered to (output):

- a) Strengthen the capabilities of local stakeholders (firms and institutions),
- b) Promote networks of local stakeholders;
- c) Improve business environment and BDS market.

In order to (outcome) enable the stakeholders to:

- a) Organize and manage joint actions;
- b) Develop a self-sustaining governance system

With the objective of (impact):

- a) Promoting an innovate/competitive private sector, and
- b) Reducing poverty.

Furthermore, the CBL unit has undertaken considerable efforts to establish a M&E system that allows to measure the performance of UNIDO CND initiatives against the above mentioned objectives. While this system is yet work in progress, the examples of indicators for outputs, outcomes and impacts given below, will be a useful reference for the thematic evaluation:

a) Output indicators:

Business networks:

- Number and type of networks (horizontal/vertical, formal/informal etc.)
- Number and type of firms in a network
- Network is trained on modern technology/production processes/ investment opportunities, accessing market opportunities/ trends,
- Network has access to technical and financial services

Capabilities of training institutions:

- Number of trained people that master new competences per assisted institution
- Type of competences/knowledge (e.g. cluster development approach, technical skills, use of training equipment etc.)
- Tools and services developed in collaboration with the institution (curricula, training courses, training packages)

Cluster governance system:

- Number and type of members
- Competences transferred to the members (leadership, strategic thinking etc)
- Linkages promoted with relevant support institutions within and outside the cluster

b) Outcome indicators:

- Joint actions developed by the networked firms including: joint purchase/retail; establishment and use of joint facilities; joint purchase and use of technology; inter-firm specialization; supplier quality/reliability; collective brands; joint investments; joint product design; joint participation in fairs; buyer provided assistance etc..
- New services/training used: Number of beneficiaries/stakeholders using the services; Frequency of use of the service, Match between demand and supply
- Credit extended to the cluster: typology and number of beneficiaries
- Public policies in support of cluster development, governmental financial allocation for cluster development
- Governance system:
 - o Functioning and features of the governance system: regular meetings, representatives of all categories of stakeholders (public and private sector), degree of formalization, procedures for decision making, linkages to service providers, frequency of interaction with policy makers
 - o Compliance with technical norms and standards;
 - o Length and nature of buyer/supplier contracts;
 - o Organization of joint events/dissemination of information: by what institution/what kind of information/ number of beneficiaries;
 - o BMOs and other private sector associations: representativeness of decision making procedures and type of leadership;
 - o Collective diagnosis capacity, planning and monitoring capacity, sustainability .

c) Impact indicators:

- Cluster competitiveness: Turnover of joint business ventures; Increase in income; Equipment modernization; New skills generated in the cluster; Increase in sales/exports; New investment as a result of credit inflow; Value addition; New products and services; New markets catered
- Poverty reduction: employment generation and employment conditions (CSR practices, labour standards, working conditions); participation of women and marginalized stakeholders as a share of a network employees, as BDS clients etc.; participation and voice mechanism for the poor; income generation for the poor (of both entrepreneurs and workers); provision of basic services and infrastructure; access to product and basic services for vulnerable groups, e.g. cost of products and services, number and type of public services etc.; vulnerable groups with access to credit; environmental sustainability of the economic activity (respect of standards, energy efficiency, use of recyclable materials, effluents treatment etc.).

II. Objectives and scope of the evaluation

This evaluation aims at answering a number of key questions, which will shed light on the relevance, effectiveness, efficiency and sustainability of these activities. It will furthermore provide inputs for the discussion of UNIDO's future CND strategy by formulating recommendations to enhance UNIDO contributions to private sector development in general and CND initiatives in particular. Hence the purpose of the evaluation is twofold:

Contribute to organizational learning by identifying strength and weaknesses of UNIDO CND initiatives with a view to enhance performance of projects and upstream activities and by providing inputs for the discussion of the future UNIDO CND strategy
Contribute to accountability by providing evidence of the achievements of the UNIDO CND initiatives.

The focus of the evaluation will be on the work of the CBL Unit, particularly on Clusters, Networks and Export Consortia including the implementation of technical cooperation projects and upstream work such as methodologies, international trainings, research, tool kits, etc.

III. Key evaluation questions

The key evaluation questions are:

Regarding the design, intervention logic and the underlying theory of change:

- Are UNIDO CND initiatives based on- and consistent with state-of-the-art knowledge about institutional change, SME development and Clusters?
- Is the design of the overall programme and of individual projects consistent with the underlying theory of change?

- Does UNIDO, through its CNL initiatives, contribute to the international body of knowledge and does it influence the way similar initiatives are planned and implemented by international agencies and donors?
- How does the CNL concept fit into the overall technical cooperation framework of UNIDO?

Regarding the implementation and the results of CNL interventions:

- Are individual CNL interventions implemented in line with the underlying theory of change?
- What are the main factors that influence effectiveness of CNL interventions (e.g. institutional anchorage, operational anchorage, access to finance, access to non-financial services, exit strategy and local contributions)?
- Are individual CNL interventions producing the expected results?
- Are individual CNL interventions producing non-intended results?
- How do implementation modalities affect efficiency and results?
- Is the implementation of CNL interventions in UNIDO organized in an efficient manner?
- Is the information on CNL interventions and their results sufficient and relevant (M&E)?

Regarding context of CNL interventions:

- Are UNIDO CNL interventions relevant and effective in the different socio-economic contexts found in different countries? Is the model flexible enough to address different cultural sensitivities?
- What are the main context factors that influence relevance of CNL interventions?
- How do UNIDO CNL interventions relate to other SME support interventions with similar objectives within and outside of UNIDO?

Besides providing an important part of the evidence base of the thematic evaluation, the review of individual projects/countries (Ethiopia, Morocco, India, Peru) will produce stand alone reports to the stakeholders of these projects. The purpose of these reviews is to enable the respective Governments, counterparts, donors and UNIDO and other stakeholders to:

(a) verify prospects for development impact and sustainability, providing an analysis of the attainment of development objectives and project objectives, delivery and completion of project outputs/activities, and outcomes/impacts based on indicators. The assessment includes re-examination of the relevance of the objectives and other elements of project design:

- Implementation approach
- Country ownership
- Stakeholder participation
- Sustainability
- Replication approach
- Financial planning
- Cost-effectiveness
- Monitoring and evaluation

- (b) Enhance project relevance, effectiveness, efficiency and sustainability by proposing a set of recommendations with a view to ongoing and future activities.
- (c) Draw lessons of wider applicability for the replication of the experience gained in this project in other projects/countries.

Methodology

The evaluation will consist of three main components:

1) Independent in-depth evaluation of several CND initiatives:

The evaluations in this component will feed into the thematic evaluation. They will follow the usual UNIDO project evaluation approach, providing information on effectiveness, efficiency, relevance, impact and sustainability of CND interventions. In addition, special attention will be given to validating the programme-inherent intervention logic (intervention theory) and the underlying assumptions. This should help to answer the question in how far the programme theory is relevant and applicable in different socio-economic contexts and whether stakeholders confirm the validity of the intervention logic with view to future impact of CND. Also, the contribution of the UNIDO programme level (or up-stream) activities to achievement of country-level results will be analyzed explicitly in each of these evaluations. Where evaluations of CND initiatives exist, they will be used as supportive evidence base. The following individual interventions will be included in the thematic evaluation through dedicated country visits:

Theme	Remarks
Ethiopia	UE/ETH/05/007, US/ETH/05/007 - Unleashing the potential of MSMEs in Ethiopia
India	A considerable number of CND projects has been carried out in India over the last 10 years. The focus of the India review will be on the UNIDO CND interventions as a whole, i.e. analysing the outcomes of UNIDO interventions in terms of institutional change and capacity building. Several projects will be included in the review, but none of them will be fully evaluated. Some of these projects are:
	US/IND/01/193 - Support to the Country Effort to Promote SME Cluster
	US/GLO/04/116 – Thematic cooperation between UNIDO and Swiss agency for development and cooperation in the area of SME cluster development and corporate social responsibility
	US/GLO/02/059 – Thematic cooperation between UNIDO and Swiss agency for development and cooperation in the area of SME networking and cluster development
Morocco	UE/MOR/07/007 – Renforcement des capacités nationales dans la promotion et accompagnement de consortia d'exportation
Peru	UE/GLO/04/148 – Promotion of SME Export Consortia

2) Review of programme-level or up-stream activities

The “UNIDO Cluster Programme” is not (yet) a formal programme, i.e. it does not have a defined structure, budget and fully explicit objectives and strategies. Given UNIDO’s dependence on donor funding, which usually is provided on a project-by-project basis, the programme rather resembles a collection of individual projects. However, over time a considerable effort has been made to learn from experience, to develop methodologies and tools, to provide a forum for CND experts and develop the UNIDO approach further. This component will analyze available information on these aspects. It will start from the explicit and implicit programme objectives, re-construct (where necessary) the underlying intervention-logic (theory of change). It will then analyze the interaction between project and programme levels. Funds mobilization and implementation modalities are also part of the analysis.

Furthermore, the use of CND within UNIDO will be looked at, recognizing that CND has a potential to be a horizontal tool to be used by all UNIDO Technical Assistance professional engaged in programmes supporting SMEs (be it for environmental or economic purposes).

3) Expert and stakeholder survey

An important aspect will be to show how UNIDO’s CND initiatives compare with those of other institutions, agencies and donors and whether UNIDO’s approach can be regarded state-of-the-art. The survey will address experts, donor representatives, technical assistance agencies and other relevant stakeholders involved in SME support initiatives.

Annex B

List of persons/institutions interviewed

Public sector

Ministries

Ministère du Commerce Extérieur, Direction de la Politique Commerciale Extérieure

Zahra Maafiri, Directeur

M. Benseddik, Chef de Division

Abdenbi Benzakour, Chef de la Cellule Assistance Technique

Public sector support institutions

Agence Nationale pour la Promotion de la Petite et Moyenne Entreprise (ANPME)

Ahmed Alagui, Chef de Division d'Appui aux PME

Abderraouf Aissaoui, Chef de Service, Partenariats et Réseaux

Salah Aydilih, Chargé de Projets

Centre Marocain de Promotion des Exportations (CMPE)

Mohammed Chahoub, Chef, Département Recherches et Etudes de Marchés

Nadia Rhaouti, Département Textile et Cuir

Société Marocaine d'Assurance à l'Exportation (SMAEX)

Abderrazzak M'Haimdat, Directeur Général Adjoint

Jamal Raïs, Directeur du Pôle Développement

Private sector

Membership organizations/associations

Confédération Générale des Entreprises Marocaines (CGEM)

Rachid Ghafir, Commission PME

Mina El Katib, Chargée de Mission, Commission PME

Saâd Hamoumi , Vice-Président Commission PME (also enterprise-member of Consortium Travel Partners Morocco)

Association Marocaine des Exportateurs (ASMEX)

Ahmed Sif, Executive Director

Association Marocaine des Industries du Textile et de l'Habillement (AMITH)

Hanine Tazi, Directeur Pôles Compétitivité & Stratégie Industrielle

Consortia

Consortium ATELIANCE (textile/habillement)

Mohamed Alaoui, Directeur Général

Larbi Guessous, Gamma Design (enterprise member)

Consortium MOSAIC (textile/habillement)

Boubker Idrissi Qaitouni, Président (Directeur Général, Interlinge)

Consortium Charm Consors (textile/habillement)

Taoufik Kabbadj, Président (Directeur Général Twins Fashion)

Armand Azran, Coordinateur, Charm Consors

Consortium Travel Partners Morocco (services)

Saad Hamoumi, Directeur Général Ulysse Voyages (also Vice-Président Commission PME, Confédération Générale des Entreprises Marocaines, CGEM)

Amina Chafra, Directeur Général, Motivation & Events

Valérie Ruel, Coordinatrice (part time) du Consortium

Consortium Odyssee (matériaux de construction)

Sabry Ziadi, Directeur Général MEKSA

Adil Seffar, Directeur Général JP Industrie

Consortium FONNOON (textile de maison)

Jamal Mouhoub, Weaving Manager, Richbond

Abdelmajid Hamrane, Commercial Manager, Tisbrod

Casa Leather Consortium (en cours de constitution formelle)

Karim Ezzaki, Manager Administrateur Group Home

Development partners

Italy (donor), Bureau de Coopération/Maroc

Francesco Grieco, Chargé de projets secteur privé, PME, infrastructure

UNIDO-Morocco

Jean-Luc Bernard, UR

Project team/consultants

Ebe Muschiali, international expert

Carlo Belliti, international expert

Abdelali Berrada, national expert principal

Mohamed El Ahmadi, national expert (Sud-Maroc)¹⁵

Other UNIDO projects/Morocco

Maurizio Cascioli, Investment Promotion Unit

UNIDO Headquarters¹⁶

Private Sector Development Branch/Cluster and Network Development Unit

Giovanna Ceglie

Fabio Russo

Gilles Galtieri

Anna Stancher

Michaela Clara

Evaluation Group

Johannes Dobinger

Peter Loewe

¹⁵ At debriefing meeting (27.10.08)

¹⁶ Joint briefing with Evaluation Team Leader (Carlo Pietrobelli)

Interview Guide

Guide d'entretien/Maroc

Questions de base et critères d'évaluation :

- Sommes nous sur la bonne voie (pertinence et appropriation) ?
- Avons-nous la bonne approche (efficacité ; efficacité/impact ; pérennité) ?
- Quels enseignements peuvent être tirés à ce stade pour baliser le futur (aboutissant à des recommandations)?

Points pour discussion (selon rôles respectifs des parties concernées)

Pertinence et appropriation	
<i>Appréciation par rapport aux besoins et priorités du Maroc : est-ce que l'intervention a répondu aux besoins réels au moment de la conception du projet et est-ce qu'elle demeure valide ? Quid de la participation des partenaires locaux à la conception du projet et de leur soutien durant la mise en oeuvre?</i>	
➤ Existence de consortia d'exportation avant le projet de l'ONUDI ? Initiative innovatrice ou expérience similaire au Maroc avant à l'appui de l'ONUDI ? Complémentarité avec d'autres initiatives ?	Min/partenaires
➤ Pertinence de l'approche par rapport au contexte socio-économique/la stratégie de développement industriel (mise à niveau ; développement des exportations)? Dans quelle mesure s'agit-il d'un outil d'appui à la compétitivité dans le cadre du Plan Emergence/d'autres stratégies?	Min/partenaires/équipe projet
➤ Pertinence de l'approche par rapport à la stratégie de réduction de la pauvreté ? Dans quelle mesure l'intervention cible-t-elle aussi des petites entreprises moins structurées/du secteur dit informel ? Est-ce que les résultats attendus se situent aussi dans le cadre des objectifs par rapport à la réduction de la pauvreté et comment?	Min/partenaires/équipe projet
➤ Pertinence pour les groupes cibles et justification de l'intervention – pourquoi les entreprises ne créent par des consortia d'exportation elles-mêmes ?	Entreprises
➤ Rôle des partenaires locaux (publics/privés) dans la formulation du projet (phase 1 et 2) ? Qui a joué/joue quel rôle dans quelle étape (design/mise en œuvre) ? Des changements à cet effet entre Phase 1 et Phase 2 quant à l'ancrage institutionnel et opérationnel?	Min/partenaires/équipe projet
➤ Appréciation du design du projet (cadre logique ; stratégie ; enseignements de projets consortia antérieurs/ailleurs inclus dans le design ?)	tous
➤ La stratégie de la phase 2, a-t-elle changé par rapport à la phase 1 (en fonction de l'expérience de la phase 1) ?	Min/partenaires/équipe projet
➤ Rôle des partenaires locaux dans la mobilisation de	Min/partenaires/équipe projet

ressources pour le projet/des ressources complémentaires cruciales pour la performance du projet ?	
➤ Pertinence de l'intervention par rapport aux priorités de l'UNDAF (Système N.U.) et par rapport au programme de l'ONUDI au Maroc	Bureau ONUDI
Efficiences <i>Appréciation par rapport à l'utilisation des ressources (fonds ; expertise ; temps) ; sont-elles converties en résultats de façon optimale ?</i>	
➤ Appréciation de l'apport et des activités de l'ONUDI : quantité, qualité, délais, coût (expertise ; formations ; méthodologies ; utilisation du budget ; procédures) ; lien entre ONUDI-terrain et siège	Min/partenaires/entreprises/bailleur/bureau ONUDI ; auto-évaluation (équipe de projet)
➤ Qualité de la gestion et de suivi journalier (équipe de gestion) et suivi stratégique (comité de suivi) ; système de suivi/auto-évaluation, outils utilisés ; rapportage et discussion/ diffusion (rapports sur état d'avancement ; études de cas ; réunions périodiques - comité de suivi/réunions inter-consortia)	Min/partenaires/entreprises/bailleur/Bureau ONUDI ; auto-évaluation (équipe de projet)
➤ Apport de contrepartie	Equipe de projet/Bureau ONUDI/bailleur
➤ Synergies/complémentarités avec d'autres interventions de l'ONUDI au Maroc/ailleurs (consortia/autres), d'autres partenaires/programmes/projets et impact sur l'efficacité du projet	Min/partenaires/bailleur/autres intervenants (bi/multilatéraux)/Bureau ONUDI, équipe de projet
Efficacité et impact <i>Appréciation de la mesure dans laquelle les objectifs ont été atteints ; résultats à court et à moyen terme par rapport aux objectifs et leur utilisation réelle</i>	
<i>Résultats court terme</i>	
➤ Description des étapes suivies et « photographie » du résultat en termes de : nombre de consortia/membres ; comment sélectionnées/ appuyées et par qui ? durée moyenne de l'appui aux consortia ? état d'avancement/degré de structuration (réseau informel/GIE) ; organisation interne des consortia ; leadership ; vision ; plan d'actions ; quelles régions ; quels secteurs ; quelle taille d'entreprises ?	Equipe de projet/min/partenaires/consortia-entreprises
➤ Evolution entre 2004 et 2008 ; comment les premiers consortia ont été utilisés dans la sensibilisation (en vue de la démultiplication de l'approche) ?	Equipe de projet/min/partenaires
➤ Différences des résultats court terme par rapport à taille d'entreprises (grande/moyenne/petite/informelle)/secteur/région (processus ; résultats ; obstacles) ?	Equipe de projet/min/partenaires
➤ Capacités développées : personnes formées sur guides méthodologiques/outils ONUDI ? Approche ? Qui a été formé (gamme d'institutions) ? Participation dans activités globales/ONUDI (formations/réunions d'expert) ? Comment la formation/les outils ont-ils été/sont ils utilisés ? Appréciation de la méthodologie ?	Equipe de projet/min/partenaires
<i>Résultats moyen terme</i>	
➤ Intégration du concept dans la législation/des stratégies nationales/mesures incitatives dont dispositif d'aide financier développé (Fonds de Soutien) : photographie	Min/partenaires

(nature du mécanisme; développé par qui; degré d'utilisation); appréciation du Fonds/des procédures; complémentarité par rapport à d'autres dispositifs de soutien aux entreprises individuelles (ciblé sur mise à niveau/exportation)	
➤ D'autres résultats au niveau des politiques/stratégies/mesures ?	Min/partenaires
➤ Résultats pour les consortia/entreprises-membres par rapport aux attentes; nature des projets commun et leurs effets (ventes/export; autres, tel que emploi; changements sur plan technologique; qualité; gestion; investissements; ...)?	Consortia-entreprises/équipe de projet
➤ Résultats en dehors du groupe (effets sur autres entreprises du même secteur/d'autres secteurs; des institutions)?	Consortia-entreprises/équipe de projet
➤ Différences des résultats moyen terme par rapport à taille d'entreprises (grande/moyenne/petite/informelle)/secteur/ région ?	Min/partenaires/équipe de projet
➤ Résultats non prévus ?	Min/partenaires/équipe de projet/entreprises
Pérennité <i>Appréciation de la mesure dans laquelle les bénéficiaires du projet continuent/continueront après la fin de l'appui</i>	
➤ Probabilité de la continuation de l'appui au développement de consortia d'exportation après l'intervention de l'ONUDI? Par quelles structures nationales? Même approche ou changements ?	Min/partenaires
➤ Y a-t-il des risques quant à la poursuite de l'effort de développement des consortia (appui aux existantes et au développement de nouvelles consortia)?	Min/partenaires/équipe de projet
➤ Combien de temps faut-il soutenir les consortia (sensibilisation/soutien)	Min/partenaires/équipe de projet
Résumé des points forts et des points faibles	
Points forts: les acquis et facteurs clefs ayant contribué aux réalisations	tous
Points faibles: principales contraintes/problèmes vécus par rapport à la création de consortia d'exportation au Maroc et risques par rapport à l'avenir	tous
Recommandations	
Pour la mission d'évaluation (rencontres à ajouter au programme; points à approfondir sur base des interviews; documents additionnels à collecter/analyser)	tous
Pour la suite de l'intervention « consortia » (phase 2) et sa pérennisation/démultiplication au Maroc	tous
Pour des interventions « consortia » ailleurs	tous

Annex D

List of documents used

UNIDO Integrated Programme /UN System		
Title	Author	Date
Programme intégré et modulaire pour l'amélioration de la compétitivité du secteur industriel au Maroc (Phase I) – rapport de la mission d'évaluation	D. Magliani, L. Cartini, P. Willot, S. Belghazi	11/2004
Programme intégré et modulaire pour le Maroc, Phase II	ONUDI-Gvt du Maroc	2007
Plan-Cadre des Nations Unies au Maroc 2007-2011, Bilan Commun de Pays	GvT du Maroc/ Système des Nations Unies	03/2006
Project related documents/reports		
UE/MOR/04/127 - Appui à la création de consortia d'exportation (document de projet, phase 1)	ONUDI-Gvt du Maroc-Italie	2004
UE/MOR/07/007 – Renforcement des capacités nationales dans la promotion et accompagnement des consortia d'exportation (document de projet, phase 2)	ONUDI-Gvt du Maroc-Italie	2007
Compte Rendu du Comité de Coordination/projet consortia, réunion du 26.11.2007	Ministère du Commerce Extérieure	11/2007
Compte Rendu du Comité de Coordination/projet consortia, réunion du 16.06.2008	Ministère du Commerce Extérieure	06/2008
Project progress reports (phase 1)	Project team	09/2006 08/2007
Mission report, national expert/agro	M. Rahmani	End 2004 ; non dated
Mission reports, 2004- 2008 (annual/monthly)	A. Berrada, national expert	2004-2008
Mission report, 2004-2007 (periodic missions)	C . Belliti, international expert	2004-2007
Rapport Final, projet UE/MOR/04/127	ONUDI/Ministère du Commerce Extérieur	01/2008
Expert Group Meeting on SME Export Consortia Development for the Agadir Agreement Countries (Rabat, 25-26 May 2007), Country Paper Morocco	A. Berrada, UNIDO consultant	05/2007

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Project work plan 2008	Project team	2008
Project progress reports (phase 2)	Project team	06/2008
Procédures d'Examen des dossiers et octroi des fonds	Comité de Gestion, Fonds d'Appui au développement des consortia d'exportation	05/2008
Case studies of the following consortia : *MOSAIC *Vitargan *Travel Partners Morocco	E. Muschiali, UNIDO consultant	2008
General strategy documents, Morocco		
Initiative Nationale pour le Développement Humain, Plan d'Action	Gvt du Maroc	08/2005
Programme « Emergence » (présentation de la stratégie)	Ministère de l'Industrie, du Commerce et de la Mise à Niveau de l'Economie	11/2005
Objectifs du Millénaire pour le Développement, Rapport National 2007	Gvt du Maroc	09/2007
General documents, Export Consortia		
Development of clusters and networks of SMEs - the UNIDO programme/ a guide to export consortia	UNIDO - FederExport (Italie)	2003
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General information on Morocco		
Country Brief Morocco	World Bank	09/2008
World Development Indicators Database	World Bank	09/2008
Le Maroc et son potentiel économique	Guides Ecofinance, Groupe Jeune Afrique	2008
Morocco Country Report	The Economist	09/2008
Morocco Country Profile	The Economist	2008

Annex E

Overview of main policy priorities, institutions and support schemes related to enterprise and trade development

1. Les politiques de soutien proposées par le projet de Loi de finance 2009

Le 23 octobre 2008, suite à une conférence de presse donnée par le ministre de l'économie et des finances, un projet de loi est publié, dans l'objectif d'ouvrir de nouvelles perspectives de croissance à l'économie nationale tout en accordant une attention particulière au développement humain dans ce contexte marqué par une crise financière aigüe. Parmi les diverses déclinaisons du projet, on peut observer quelques politiques de renforcement au niveau des activités qui constituent la principale cheville ouvrière du développement industriel et commerce extérieur.

➤ **Industrie**

- ✓ Création de zones industrielles, de technopoles intégrés et d'agro-pôles ;
- ✓ Élargissement de la plateforme industrielle et mise à niveau des moyens de production ;
- ✓ Renforcement de la formation et son adaptation aux besoins : formation de 200.000 stagiaires ;
- ✓ **Mise à niveau des PME** : allocation de **600 MDH** dont **125 MDH** en 2008 ;
- ✓ Mise en œuvre d'une nouvelle vision du secteur des technologies de l'information ;
- ✓ Allocation au profit des activités industrielles des crédits d'investissement d'un montant de 1 MMDH soit +40% par rapport à 2008.

➤ **Promotion des Exportations**

- ✓ Développement de la commercialisation et la promotion des produits à l'export profitant des opportunités créées par les stratégies sectorielles nouvelles : agriculture, industrie, off-shoring;
- ✓ Amélioration de la compétitivité des PME à l'export essentiellement à travers l'exploitation des possibilités offertes par les différents accords de libre échange ;
- ✓ Promotion des produits Marocains dans les marchés cibles : Forums, campagnes de communication autour de la qualité des produits ;
- ✓ **Appui aux consortiums pour promouvoir les exportations** ;
- ✓ Renforcement de l'information et de la communication dans le domaine de l'exportation ;
- ✓ Création d'un **fonds d'appui aux exportations** d'un montant de **500 MDH** ;
- ✓ Hausse des crédits consacrés au secteur du Commerce Extérieur de 40%.

➤ **Soutien à l'essor et au renforcement des PME à travers :**

- ✓ La baisse de la charge fiscale (IR) ;
- ✓ La baisse des droits de douane (réforme tarifaire) ;
- ✓ L'octroi d'une incitation fiscale pour encourager le renforcement des fonds propres ;
- ✓ Une meilleure prise en charge de la formation professionnelle ;
- ✓ Le bénéfice du nouveau mécanisme de soutien à l'exportation.

➤ **Artisanat**

- ✓ Émergence d'acteurs de référence nouveaux pour le développement des exportations ;
- ✓ Relèvement du revenu des artisans et amélioration de leurs conditions de travail ;
- ✓ Renforcement de la formation dans le secteur ;
- ✓ Allocation d'une enveloppe de **301 MDH**, soit une augmentation de 13% par rapport à 2008.

➤ **Tourisme**

- ✓ Renforcement des capacités d'accueil;
- ✓ Plan Mada'in pour le développement régional touristique (75.500 lits);
- ✓ Plan Biladi pour le développement du tourisme local (30.000 lits) ;
- ✓ Renforcement des actions de formation : 70.000 stagiaires ;
- ✓ Allocation d'une enveloppe **de 823 MDH**, soit une augmentation de 11% par rapport à 2008.

➤ **Les projets de création des zones franches d'exportation**

Les zones franches d'exportation sont régies par la loi 19-94 du 1995. Cette loi a institué un nouveau régime consistant à concéder l'aménagement et la gestion des espaces destinés aux activités industrielles et de services, soustraites à la réglementation douanière et le contrôle de commerce extérieur et des changes. En plus du **statut préférentiel** accordé dans les zones franches d'exportation, les entreprises installées bénéficie de divers **avantages fiscaux** ainsi que des **aides des fonds HASSAN II pour l'investissement**. Actuellement, une seule zone franche d'exportation est opérationnelle à Tanger gérée par la société **Tanger Free Zone**, avec une superficie de 345 ha et composée **d'une zone industrielle** sous-douane abritant plus de 120 entreprises et une zone logistique pouvant accueillir près de 900 camions, lesquelles sont dotées des équipements et de la logistique répondant aux normes internationales.

➤ **Le Programme « Emergence »**

Suite à l'étude réalisée par le cabinet international MC Kinsey qui a permis de dresser un état des lieux sur la santé économique du Maroc, une série de recommandations a donné

naissance au programme Emergence qui identifie, commente et valorise les pôles de croissance de l'économie nationale. Le Plan « Emergence » représente une nouvelle politique industrielle qui se veut volontariste et qui met en avant les facteurs compétitifs du pays. Ce plan cible des secteurs et des métiers (moteurs de croissance) où le Maroc peut se positionner au niveau international dans le cadre de la spécialisation qui se profile derrière la mondialisation des économies. Cette stratégie de ciblage s'est axée autour de sept (7) secteurs moteurs de croissance, orientés export, les Métiers Mondiaux du Maroc (3M), qui représenteront 70% de la croissance industrielle à l'horizon 2015. Il s'agit principalement de l'Off-shoring, Automobile, Aéronautique, Electronique, Agroalimentaire, Produits de la mer et le Textile.

Le Plan Emergence devrait générer sur les 10 prochaines années:

- ✓ 9 milliards d'euros de PIB supplémentaire;
- ✓ Soit 1,6 point de croissance en plus par an;
- ✓ 440.000 emplois;
- ✓ Et réduire de moitié le déficit commercial.

➤ **Le Plan AZUR**

Dans le cadre du projet de Développement touristique, le Maroc s'est engagé à l'Horizon 2010, à se positionner parmi les premières destinations touristiques mondiales. C'est dans cette lancée que le *Plan azur* a été initié par les autorités, afin de matérialiser les projets touristiques du pays. De façon concrète, le plan vise à attirer 10 millions de touristes aux alentours de 2010. Il prévoit la réalisation de **six stations balnéaires** avec un investissement global de **5 Milliards d'euros**. Le plan AZUR associe deux approches, à savoir la gestion environnementale et une démarche qualité, dans l'optique de conduire le projet vers un tourisme durable.

➤ **Le Plan Vert**

Dans le cadre du développement de l'activité agricole, le Maroc s'est doté d'un programme pragmatique et ambitieux qui cherche à développer, dans des délais courts, la sphère agricole au profit de l'ensemble des acteurs. Ce programme nommé, le "Plan Vert" vise la mise sur pied de 1.000 à 1.500 projets par an avec des investissements de l'ordre de 10 milliards de dirhams. La nouvelle stratégie définit la situation du secteur, son potentiel de croissance, les énergies qu'il recèle, ainsi que les défis et contraintes entravant son développement.

Le plan s'articule autour des approches de développement intégré axées sur de deux piliers :

- ✓ Le développement d'une agriculture à forte valeur ajoutée et à haute productivité tournée essentiellement vers l'exportation avec des investissements durant la période 2009-2020 d'environ **120 MMDH** ;
- ✓ La mise à niveau solidaire du tissu productif au profit de 800.000 agriculteurs à travers la reconversion et développement des activités agricoles locales pour un investissement d'environ **20 MMDH** pour la même période.

2. *Les institutions et leurs mesures de soutiens respectives*

- **Ministère du Commerce, de l'Industrie et des Nouvelles Technologies (MCINET)**

Ce Ministère se charge depuis toujours d'élaborer et de mettre en œuvre des politiques commerciales et industrielles du Gouvernement. Il apporte sa contribution dans l'amélioration de la compétitivité et la mise à niveau du secteur industriel. Cela se matérialise par des actions de soutien, apportées au développement du secteur privé, à la promotion de la normalisation, de la certification et de la qualité des produits industriels, et aussi à la préparation et la conduite des négociations économiques et commerciales internationales.

En partenariat avec l'Organisation des Nations Unies pour le Développement Industriel (**ONUUDI**), le Ministère s'est engagé dans la promotion de la PME (qui représente aujourd'hui 92% du tissu productif marocain), avec des actions visant à dynamiser leurs capacités exportatrices, en incitant le regroupement au sein du consortium d'exportation. Le **MICNT** agit aussi souvent, en tant que partenaire des autres institutions qui œuvrent dans le cadre de la promotion des PME et aussi en matière d'exportation.

- **Ministère du Commerce Extérieur (MCE)**

Le ministère du commerce extérieur, en plus de ses projets législatifs et réglementaires, prévoit des actions de promotion du commerce extérieur.

Il appuie les entreprises par la mise en place d'un système d'encouragement des exportations composé des principaux instruments suivants:

- Incitations fiscales et mesures assimilées;
- Promotion des exportations;
- Zones franches d'exportation;
- Financement et assurance à l'exportation;
- Facilités de change.

En ce qui concerne les incitations fiscales et mesures assimilées, en vertu de la charte des investissements les exportations bénéficient des exonérations fiscales suivantes:

- ✓ l'exonération totale de l'impôt sur les sociétés (I.S.) ou de l'impôt sur le revenu (I.R) pendant une période de 5 ans et une réduction de 50% au-delà de cette période, pour les entreprises exportatrices de produits ou services, pour le montant de leur chiffre d'affaires à l'exportation;
- ✓ l'exonération de la TVA avec droit à déduction sur les produits et prestations de services rendus à l'exportation.

Aussi, les régimes économiques en douane octroient le bénéfice de la suspension des droits et taxes dont sont passibles les marchandises ainsi que la levée des prohibitions et restrictions commerciales, à l'exception des prohibitions absolues (sécurité, santé, préservation de l'environnement, etc...). Pour concrétiser ses actions, le MCE travaille en partenariat avec des structures publiques et privées. Notamment le MCE en partenariat avec le MCINET ont pu appuyer le projet de l'ONUDI dans le développement des consortiums à l'export, depuis 2003. Depuis 2006 le MCE met à la disposition des consortiums constitués un Fonds de soutien, pour les activités de promotion.

- **Centre Marocain de Promotion des Exportations (CMPE)**

La promotion des exportations constitue un des aspects névralgiques de développement des exportations et le principal instrument destiné à cette fin est le Centre Marocain de Promotion des Exportations (**CMPE**), qui est sous la tutelle du MCE. Le **CMPE** a pour principale mission de promouvoir les exportations de produits d'origine agricole et industriels, à travers les diverses prestations rendues aux exportateurs, à savoir :

- l'organisation des foires, salons et missions économiques et commerciales ;
- la prospection et l'information sur les marchés ;
- la mise en relation commerciale ;
- le test de produits ;
- l'assistance et la formation à l'export.

Ces différentes actions du CMPE, ont été d'un réel intérêt pour les PME, notamment les groupements créés dans le cadre du programme des consortiums d'exportation. A ce titre, le CMPE subventionne les consortiums dans différentes manifestations de leurs programmes d'activités. Dans le cas des participations aux foires et salons internationaux, ces subventions peuvent aller jusqu'à **85% du coût**.

Le **CMPE**, domicilié et confié (Par ordre du MCE) la gestion du fond de soutien accordé aux **consortiums d'exportation**, à l'ASMEX. A côté du CMPE, d'autres associations professionnelles privées (avec lesquelles il travaille en étroite collaboration) jouent un rôle important dans la promotion des exportations.

- **Association Marocaine des Exportateurs (ASMEX)**

L'ASMEX a pour mission de représenter et de promouvoir la fonction et le rôle des exportateurs marocains en œuvrant à défendre leurs intérêts, à élargir leurs débouchés, les assister dans le développement de leurs compétences et promouvoir l'investissement et le partenariat multiforme avec les opérateurs étrangers. Elle assure principalement les actions suivantes:

- Participation à la réflexion sur la stratégie nationale de promotion commerciale;
- Organisation d'études, enquêtes et bases de données;
- Mises en relations;
- Organisation des missions, foires et salons;
- **Incitation à la création de consortia d'exportation;**
- Sensibilisation, orientation.

L'ASMEX gère le **fond de soutien accordé par le MCE aux consortiums des PME à l'exportation**. Ce soutien se matérialise par des aides financières accordées à hauteur de **100 000 DH** pour les activités de démarrage et **200 000 DH/année** (sur trois ans) pour les actions de promotion.

L'ASMEX publie également **un bulletin mensuel**, dans lequel se dressent des observations relatives aux activités d'exportation et, parmi lesquelles figure l'état d'avancement des consortiums d'exportation. Elle organise régulièrement avec le concours du CMPE et du MCE, **la caravane de l'exportation** au cours de laquelle, différents points sont débattus dans les régions respectives du Maroc. L'objectif étant, de promouvoir les actions des exportateurs régionaux, parmi lesquelles, des **incitations à la création des consortiums d'exportation**, mais aussi de noter leurs doléances afin d'apporter des améliorations.

- **Agence Nationale pour la Promotion de la Petite et Moyenne Entreprise (ANPME)**

L'Agence Nationale pour la Promotion de la Petite et Moyenne Entreprise (ANPME) est un instrument opérationnel des pouvoirs publics (sous tutelle du MCINET) en matière de promotion et de développement des PME. Elle a pour mission de contribuer de façon active à la promotion, au développement et à modernisation compétitive de l'entreprise, en s'appuyant sur le réseau d'institutions publiques et privées de promotion existantes, tout en les dynamisant et en coordonnant leurs actions. Les actions de L'ANPME se matérialisent par :

- ✓ L'élaboration et la mise en œuvre de programmes d'appui et d'assistance technique aux PME ;
- ✓ La contribution à l'amélioration de l'environnement de la PME ;
- ✓ L'apport de soutien et d'encouragement aux réseaux et aux structures d'appui des PME ;
- ✓ L'assistance et la promotion du partenariat aux niveaux local, régional, national et international, entre PME et Grandes Entreprises ;

- ✓ L'amélioration de l'accès de la PME aux terrains et locaux professionnels à des prix avantageux grâce à une prise en charge d'une partie des coûts d'aménagement des infrastructures y afférentes ;
- ✓ La collecte, le traitement et la diffusion de l'information sur et pour la PME.

Depuis la création des **consortiums d'exportation**, L'ANPME, en tant que mesure d'appui, apporte un soutien technique aux groupements d'entreprises souhaitant constituer et/ou développer un consortium d'exportation, en prenant en charge les frais d'expertises nécessaires à la réalisation d'actions ciblées de conseil, d'assistance technique et de promotion.

- **Association Marocaine de l'Industrie du Textile et de l'Habillement (AMITH)**

La création de l'Amith a permis de soutenir depuis plusieurs décennies l'évolution des activités du secteur de textile. Secteur qui, il faut le rappeler représente 52% des exportations industrielles et composés essentiellement de PME. L'Amith compte plus de 1600 entreprises, dont les plus structurées et les plus performantes, représentant 93 % de ses exportations et 80% des emplois de l'ensemble du secteur, ce qui lui donne une forte légitimité. Elle a développé un large réseau pour asseoir son action, elle est ainsi membre active de plusieurs autres associations à l'échelle internationale

- Fédération du Textile Européen (Euratex);
- Fédération Internationale des Industries Textiles (ITMF);
- Fédération Internationale de l'Habillement (IAF) ;
- la Fédération Internationale de la Maille (FIM);
- Alliance Euro -Méditerranéenne Textile (Collabo-Text).

L'AMITH est également membre fondateur de la Cité Euro Méditerranéenne de la Mode (CEM), dont elle assure depuis 2005 la co-présidence au côté de la Fédération Française des Industries de l'Habillement. Elle accompagne ses membres à plusieurs niveaux de leurs activités, telles que la formation, la promotion, la mise à niveau, le tout est couronné par la création d'un Centre Technique du Textile et de L'Habillement (**CTTH**), outil efficace pour le développement de la compétitivité du secteur Textile et Habillement.

Il convient aussi de préciser que l'AMITH, est un partenaire très actif de l'ONUDI dans le **programme des consortiums des PME à l'exportation**. A ce titre, l'association a créé au sein de sa structure un **pôle consortium**, renommé pôle stratégie et qui se charge de mettre son service à la disposition des membres organisés en consortium ou sur le point d'y être. L'AMITH octroie également un fond de 1000 000 DH de soutien supplémentaire aux consortiums du secteur textile. Elle organise régulièrement, en partenariat avec l'ANPME et le Programme d'Appui aux Entreprises (**PAE**) un **Road Show** pour les entreprises exportatrices du secteur. Cet événement donne lieu à des tables rondes autour desquelles plusieurs intervenants (entrepreneurs, experts, cabinets de consulting et structures de

financement) dressent un diagnostic des activités du secteur et redéployent, par la même occasion des actions correctives.

Il faut préciser que de toutes les structures bénéficiaires, les consortiums d'exportations sont les plus actifs, du fait de leur pouvoir de négociation relativement plus important que les autres entreprises, qui agissent de façon individuelle.

- **Confédération Générale des Entreprises du Maroc (CGEM)**

La CGEM, promoteur privé au Maroc, elle a pour rôle d'orienter, d'encadrer et informer l'entreprise marocaine, en particulier la PME, dans sa quête de partenariat de qualité. Elle agit comme force de proposition et partenaire de réflexion des Pouvoirs Publics. Ses principales missions sont de promouvoir l'entreprise et l'investissement au Maroc, représenter l'entreprise et défendre ses intérêts, améliorer l'environnement économique et social de l'entreprise, encadrer et renforcer les fédérations d'entreprises et les structures associatives, telles que **les consortiums d'exportations**, et développer des services utiles pour l'entreprise notamment la PME et l'accompagner dans sa mise à niveau. La CGEM domicile et gère également les fonds de soutiens octroyés par la commission européenne dans le cadre du **PAAP**, au profit **des associations professionnelles**.

La confédération des entreprises a mis en place une **commission PME** au sein de son organisation qui, en plus de sa participation aux différentes actions de promotion de la PME (organisées par d'autres structures), organise chaque année le **rendez-vous de la PME**. Ce rendez-vous est spécialement un lieu de rencontre entre entrepreneurs et structures d'appuis, dans l'objectif de statuer sur diverses perspectives de développement de la PME dans différents secteurs, parmi lesquelles **l'incitation à la création de consortiums de PME à l'exportation**.

- **La Société Marocaine de l'Assurance à l'Exportation (SMAEX)**

La SMAEX est une société d'économie mixte qui a pour objet la gestion du système d'assurance à l'exportation. Elle est chargée:

- d'assurer, pour le compte de l'Etat et sous son contrôle, les risques politiques, catastrophiques et de non transfert, les risques commerciaux extraordinaires afférents à l'assurance crédit ainsi que les risques afférents à l'assurance prospection et l'assurance foire;
- d'assurer pour son propre compte et sous le contrôle de l'Etat, les risques commerciaux ordinaires afférents à l'assurance crédit.

Ces actions reflètent le rôle essentiel de promotion des exportations, joué par cette institution et ce, parce qu'elle permet de :

- sécuriser les transactions des exportateurs;
- partager avec les exportateurs les risques de prospection infructueuse;
- faciliter l'accès au financement aux assurés.

Notamment dans le cadre de l'appui accordé au développement des consortiums à l'export, la SMAEX accorde des taux préférentiels aux entreprises membres de consortium.

- **Etablissement Autonome de Contrôle et de Coordination des Exportations (EACCE)**

L'EACCE est chargé principalement de garantir la conformité des produits alimentaires marocains destinés à l'exportation aux exigences réglementaires des marchés internationaux et de s'assurer du bon respect de toutes les dispositions obligatoires liées au risque de la santé humaine. Il assure aussi la coordination de l'activité d'exportation des produits soumis à son contrôle technique par une gestion concertée et valorisante de nos exportations.

- **Conseil National du Commerce Extérieur (CNCE)**

Le Conseil National du Commerce Extérieur a pour mission de:

- formuler des avis consultatifs sur toute matière concernant les relations commerciales extérieures;
- émettre des suggestions de nature à renforcer la compétitivité des produits et services marocains sur les marchés étrangers;
- établir un rapport annuel qui fasse ressortir son appréciation sur l'évolution des échanges extérieurs, sur le comportement des importations et des exportations au regard de l'environnement national et international;
- décerner chaque année des Prix Nationaux d'Exportation (**TROPHEES**) aux entreprises les plus méritantes au vu de leurs performances commerciales sur les marchés étrangers.

- **Fédération des Chambres de Commerce, d'industrie et de service (FCCIS)**

La **FCCIS**, regroupe l'ensemble des chambres de commerce, de l'industrie et de services placées sous la tutelle **MCINT**. En plus de ses missions administratives et de promotion économique, la fédération représente les entreprises auprès des autorités publiques. La FCCIS intervient beaucoup dans le cadre de la promotion des activités de commerce d'industrie et des services de pays. A ce titre, elle fournit ses appuis aux actions de création d'entreprise, de modernisation (qualité et normalisation) et aux associations professionnelles. La FCCIS met aussi à la disposition des entreprises, associations professionnelles et **aux consortiums**, ses locaux, pour la l'organisation de toutes actions visant à promouvoir leurs activité, à savoir les rencontres, les formations, les salons et foires (nationaux et internationaux).

- **Maison de l'Artisan**

Dans le cadre de la promotion des exportations de produits artisanaux, il a été mis en place, sous la tutelle du Ministère du Tourisme de l'Artisanat une **Maison de l'Artisan** qui est établissement public doté de la personnalité morale et de l'autonomie financière. Cette Maison se charge de promouvoir les produits artisanaux au niveau national et international, à travers plusieurs actions qui se structurent comme suit :

- Conseiller et assister l'artisan afin d'améliorer la qualité de ses produits et lui assurer une meilleure productivité ;
- Encadrer l'artisan exportateur afin de se développer sur des marchés cibles et l'accompagner dans ses démarches ;
- Prospector et explorer les nouveaux marchés susceptibles d'accueillir les produits marocains en nouant des contacts commerciaux ;
- Expertiser et évaluer l'offre de produits exportable, afin de définir une gamme d'objets, leur potentiel à l'exportation, leur coût de production, leur prix à l'exportation ;
- Adapter les produits aux exigences et aux goûts des consommateurs grâce à des études de marché ;
- Concevoir et produire des campagnes publicitaires dans les salons spécialisés au Maroc et à l'étranger ;
- Représenter le secteur de l'artisanat aux manifestations commerciales.

3. *Les programmes d'accompagnement*

- **Programme d'Appui aux Entreprises (PAE)**

Programme, financé par l'Union européenne à hauteur de **61 M€**, s'inscrit dans le cadre de la nouvelle stratégie industrielle marocaine « EMERGENCE » et plus particulièrement de son pilier « Modernisation Compétitive ». Ce financement communautaire prévoit d'accompagner la mise en œuvre de l'Accord de Libre Echange signé entre le Maroc et l'UE et d'apporter une assistance technique et managériale aux projets d'investissement et dans le renforcement de l'infrastructure technologique.

Le PAE associe dans sa démarche les structures suivantes :

- L'ANPME, responsable des volets **Modernisation des PME** et **FOMAN¹⁷-Assistance technique**.
- La Caisse Centrale de Garantie (CCG), responsable du volet **FOMAN Cofinancement**.
- La Direction de la Promotion de la Qualité et de la Normalisation (DQN), responsable du volet **Qualité - Normalisation**.
- Une Unité de Gestion du Projet (UGP) constituée d'experts, mobilisés par la commission européenne.

¹⁷ Fonds National de Mise à Niveau

- **Programme d'appui aux associations professionnelles (PAAP)**

Le **PAAP**, inscrit dans le cadre de **MEDA**¹⁸, est un projet financé par la commission européenne et, domicilié et géré par la **CGEM**. Il vise à renforcer la capacité des associations professionnelles dans la fourniture des services de leurs membres, à améliorer leur représentativité et, par conséquent accroître leurs ressources tant financières qu'en moyens d'action.

Le projet soutient, après sélection, une trentaine d'associations professionnelles et fédérations industrielles. Celles-ci doivent préparer et présenter un plan d'action d'une durée de deux ans, si nécessaire, d'un appui de la part d'une expertise extérieure. Ces plans d'action, une fois sélectionnés par le programme pour le financement, doivent être en mesure de renforcer la structure des associations professionnelles, candidates et, par ce moyen, d'augmenter et d'améliorer la qualité des services rendus aux entreprises adhérentes. Le budget disponible par le plan d'action est, sauf exceptions, d'un maximum de **230 000 Euros**. Le projet est domicilié au sein de la **CGEM** et est appuyé par une assistance technique européenne à long terme.

Les résultats forts encourageant du projet ont amené la commission européenne à décider de son extension d'un an au moyen d'un budget additionnel de **845 000 euros**. Les fonds de financement octroyés au programme (PAAP) s'élèvent à **7,149 millions d'euros**, dont **5,845 millions** d'euro financés par la Commission Européenne et 1,304 millions par la population bénéficiaire.

Il faut noter que ce programme dans sa deuxième phase (**PAAP II - 2006/2009**), accorde beaucoup d'intérêts aux actions de mise à niveau de l'économie et des entreprises, en particulier les **PME**, à travers l'**ANPME**, qui accorde une place important à l'action par le biais des associations professionnelles.

- **Programmes MEDA**

Suite au règlement adopté le 15 juillet 1996, l'Union européenne s'engage à renforcer son intervention dans les pays du sud de la Méditerranée, principalement dans 3 directions: soutien de la stabilité politique et de la démocratie, création d'une zone de libre-échange, coopération dans le domaine social, culturel et humain. C'est le programme MEDA. Ce programme a été conçu, afin d'assurer la transition des pays méditerranéens vers la mise en place d'une Zone de Libre Echange (**ZLE**) à l'Horizon 2010.

Dans sa phase initiale, (**MEDA I**), ce projet apporte son appui dans un premier **volet à la transition économique** du pays à travers la création des programme tels que : Programme d'appui aux associations professionnelles (PAAP), appui au programme pour la promotion

¹⁸ Project lancé dans le cadre du partenariat Euro-méditerranéen dans l'objectif de soutenir les actions de stabilité politique, de développement économique, socio-culturel et de développement humain en général afin d'assurer la transition des pays méditerranéens vers la mise en place d'une Zone de Libre Echange (**ZLE**).

de la qualité, appui à la privatisation, Projet d'Appui aux Institutions de Garantie (PAIGAM) et les capitaux à risque. Puis dans un second volet au **renforcement de l'équilibre socio économique**, action des actions d'aide au développement humain essentiellement (Eau et assainissement en milieu rural, Habitat Social, appui à la création d'emploi, soutien à l'éducation de base etc.). Le financement prévu pour **MEDA I** s'élève à 476, 8 millions d'euros.

Dans la deuxième phase (**MEDA II**), Le projet connaîtra la mise en place de nouveaux programmes d'appuis en complément des premiers, avec une enveloppe supplémentaire de 537, 4 millions d'euros. Par ces nouveaux programmes on peut citer le programme d'appui aux entreprises (PAE), l'appui au développement de la formation professionnelle dans le secteur du textile, tourisme et NTIC, le programme d'appui à la mise en œuvre de l'accord d'association (PAAA), etc.

- **Projet GTZ (Formation Professionnelle)**

Dans le souci d'assurer le développement des secteurs industriels, des PME et le système de l'emploi, les Gouvernements du Maroc et d'Allemagne ont convenu de réaliser un Programme de Formation Professionnelle en Milieu du Travail pour contribuer à améliorer la compétitivité des PME et des ressources humaines dans les secteurs textile/habillement et tourisme notamment leurs capacités d'innovation et de modernisation. Ce programme est mis en œuvre par le Ministère chargé de la Formation Professionnelle (SEFP), l'Association Marocaine des Industries Textiles et Habillement (AMITH), la Fédération Nationale des Industries Hôtelières (FNIH) et la Coopération Technique Allemande au Développement (GTZ).

Ce programme vise principalement à :

- Accompagner les entreprises partenaires à mettre en place une fonction ressources humaines connectée aux choix stratégiques et orientée sur les besoins en recrutement et en développement des compétences ;
- Développer l'employabilité des jeunes, des demandeurs d'emploi et des travailleurs ;
- Assister les entreprises du textile/habillement et du tourisme, volontaires à monter des formes innovantes de la formation initiale et en cours d'emploi, telles que des Centres de Formation par Apprentissage-Intra Entreprises (CFA-IE) ;
- Assister les GIAC et les cabinets privés de conseil en ressources humaines dans le développement de nouvelles démarches intégrées pour les interventions en entreprise ;
- Appuyer la création au sein des associations professionnelles (AMITH et FNIH) d'une structure de conseil et d'assistance aux entreprises pour la promotion de la formation en milieu de travail.

Annex F

Overview of consortia creation to date

Status as at 17.11.08 prepared by the project team, covering:

(i) Consortia formally established

(ii) Consortia in the process of formal establishment

(iii) Consortia under preparation/reorganization

(i) Consortia formally established

Secteur productif	Consortia constitués	Ville	no. Entreprises*	Concurrents (H) ou complémentaires (V)	Effectif	Taille des entreprises membres (P, M, G)*	Date de démarrage du réseau	Date de création juridique	Forme sociétaire	Capital	Directeur / coordinateur	Constitution du Consortium et avancement										Accès au fonds d'appui***
												Outils de comm.			Promotion à l'étranger			Mise à niveau		Formation		
												Brochure	Site web	CD	Foires	Missions comm	Invitation clients	Financé ANPME	Autre	CFA ¹⁹	autres formations	
1	Habillement	MOSAIC	Casablanca	6	V	1370	M	2004	2004	GIE	oui	non							GIAC ²⁰		coaching	I
2	Habillement	LOOK AVENUE	Casablanca	5	V	2090	M	2005	2006	GIE	non	oui							GIAC			I
3	Textile maison	FONON	Casablanca	6	H	535	G	2005	2006	GIE	oui	non										I
4	Habillement	CHARM CONSORS	Casablanca	4	V	750	M	2005	2007	GIE	oui	oui										I
5	Tourisme	Travel Partners Morocco	Casablanca	7	H	80	P	2006	2006	GIE	non	oui										I
6	Matériaux construction	ODYSSEE	Casablanca	5	V	212	M	2006	2007	GIE	non	non										I
7	Agro	VITARGAN	Essaouira	6**	H	349	P	2005	2006	GIE	oui	non									marketing	I
8	Agro	ARGAN TAROUDANT	Taroudant	6**	H	331	P	2005	2005	GIE	oui	oui				local					marketing	E.C.
9	Électricité	DRAGO	Casablanca	3	V	352	M et G	2007	2007	GIE	non	oui										I

¹⁹ CFA : Centre de Formation par Apprentissage

²⁰ GIAC: Groupements Interprofessionnels d'Aide au Conseil (contrats spéciaux de formation)

Secteur productif	Consortia constitués	Ville	no. Entreprises*	Concurrents (H) ou complémentaires (V)	Effectif	Taille des entreprises membres (P, M, G)*	Date de démarrage du réseau	Date de création juridique	Forme sociétaire	Capital	Directeur / coordinateur	Constitution du Consortium et avancement										Accès au fonds d'appui***		
												Outils de comm.			Promotion à l'étranger			Mise à niveau		Formation				
												Brochure	Site web	CD	Foires	Missions comm	Invitation clients	Financé ANPME	Autre	CEA ¹⁹	autres formations			
10	Habillement	ATELIANCE	Casablanca	7	V	3730	M et G	2007	2007	GIE	oui	oui											I	
11	Agro	TISSALIWINE	Agadir	22**	H	867	P	-	1999	GIE	oui	oui				local							marketing	I
12	Agro	TIZARGANE	Tiznit	5**	H	196	P	2006	2007	GIE	oui	oui				local							marketing	I
13	Mécatronique	GE3M	Mohamedia	4	V	329	M	2007	2008	GIE	oui	oui												E. C. E. C.
14	Habillement	EVERLAST	Casablanca	4	V	1320	M	2005	2008	GIE	non	oui												E. C. E. C.
15	Maroquinerie	Le Maitre Maroquinier de Fez	Fez	5	H-V	175	P	2006	2008	GIE	oui	non	En cours	En cours		local								En cours

* P = Petite ; M=Moyenne ; G= Grande
** Number of member cooperatives
*** I = first allotment of Support Fund dedicated to consortia

(ii) Consortia in process of formal establishment

Secteur productif	Noms sociétés membres	Ville	no. Entreprises*	Concurrents (horizontal) ou complémentaires (vertical)	Effectif	Démarrage du réseau	Taille des entreprises membres	Constitution de Groupement et avancement						Actions déjà mises en place	
								Sensibilisé	Motivé	Analyse des besoin	Forme juridique	Statut	Règlement Intérieur	Promotion (foires et salons)	Mise à niveau
Chaussure	Atlas Fabrication, Taine Shoes, Groupe Home, Celtic	Casablanca	4	V	355	2008	P							Marocour (national)	
Agro	UNITEAM EXPORT	Casablanca	4	V	940	2007	M						Sial	étude de marché	
Habillement	Cogenod, Newline, Siconord	Tanger	3	V	1230	2008	M								

(iii) Consortia under preparation/reorganization

Secteur productif	Noms sociétés membres	Ville	no. Entreprises*	Concurrents (horizontal) ou complémentaires (vertical)	Effectif	Taille des entreprises membres	Démarrage du réseau	Constitution de Groupement et avancement						Actions déjà mises en place			
								Sensibilisé	Motivé	Analyse des besoins	Forme juridique	Statut	Règlement Intérieur	Promotion (foires et salons)	Mise à niveau	Autre	
Composante auto	DEV AUTO	Casablanca / Fez	7	V		M et G	2007										
Habillement	FASHION POOL	Fez	4	V	1240	M	2007										
Mécanique	OXICAM	Casablanca	4	V	81	M	2007										
Mécanique et électronique	Mecadex, CNC Maroc, ACJH, Framatic Laser	Casablanca	4	V		M	2007							Midest			
NTIC	Synthèse, Ingenius, Telio	Rabat / Casablanca	3	V	42	P	2007										
Ingénierie	EXCELSYS	Rabat / Casablanca	4	V	585	P et M	2007										

Annex G

List of main training/exchange activities to date

(conducted in phases 1 and 2 for Morocco or combined with other countries)

Study tours	
Italy (Rome and Florence) - 2 participants	May 2004
Italy (Rome/consortia/clusters in Santa Croce sull'Arno/Florence/Parma/Bologna; paid from ITPO project funds) - 4 participants	November 2007
Italy (Rome/Ravenna/Ferrara-Parma/Turin) - 5 participants	October 2008
Expert Group Meetings	
Italy (Olbia) - 2 participants	Sept 2005
Morocco (Rabat), Agadir Agreement countries	May 2007
Training programme (Turin), UNIDO-ILO	
2006 edition (2 participants)	2006
Local training workshops	
Phase 1 training workshop	September 2004
Phase 2 training workshop (series)	October 2008 (Rabat) - some 30 participants
	November 2008 (Casablanca)
	Early 2009 (Southern Morocco; location to be determined)