



USAID
FROM THE AMERICAN PEOPLE

MOROCCO ECONOMIC COMPETITIVENESS:

EXPLORATORY STUDY ON SUPPLY AND DEMAND FOR SKILLED LABOR IN THE POTTERY INDUSTRY IN SAFI – DOUKKALA-ABDA REGION



MAY 2010

MEC DOCUMENT 7

This publication was produced for review by the United States Agency for International Development. It was prepared by DAI.

MOROCCO ECONOMIC COMPETITIVENESS:

EXPLORATORY STUDY ON SUPPLY AND DEMAND
FOR SKILLED LABOR IN THE POTTERY INDUSTRY
IN SAFI – DOUKKALA-ABDA REGION

Submitted to USAID/Morocco, Economic Growth Office - Assistance Objective 3: Reduced barriers to trade and investment

By DAI

Contract Number: EEM-I-00-07-00009-00: Task Order Number: EEM-I-07-07-009

The authors' views expressed in this publication do not necessarily reflect the views of the United States Agency for International Development or the United States Government.

Morocco Economic Competitiveness Program

8, rue du Rif

Souissi

10 000 Rabat

Morocco

Tel: (212) 05 37 63 05 59

Fax: (212) 05 37 63 05 61

andrew_watson@dai.com

www.mecprogram.ma

TABLE OF CONTENTS

I	INTRODUCTION	1
1.1	MOROCCO ECONOMIC COMPETITIVENESS PROGRAM (MEC)	1
1.2	SUMMARY OF EXPLORATORY STUDY OBJECTIVES	1
1.3	ELEMENTS OF METHODOLOGY	1
	DEFINING THE FIELD OF RESEARCH	1
	DATA COLLECTION METHODS.....	2
2	BACKGROUND	3
2.1	NATIONAL STRATEGY FOR HANDICRAFT DEVELOPMENT	3
2.2	VISION 2015: ARTISANAL POTTERY INDUSTRY ACHIEVEMENTS	3
2.3	THE ARTISANAL PRODUCTION PROGRAM OF THE MILLENIUM CHALLENGE CORPORATION	5
3	THE SAFI ARTISANAL POTTERY INDUSTRY	7
3.1	SEVERAL STATISTICS ON THE HANDICRAFTS INDUSTRY	7
	SALES AND JOB VOLUME	7
	EXPORT ACTIVITIES.....	9
3.2	THE REGIONAL INITIATIVE PLAN FOR HANDICRAFT DEVELOPMENT	9
3.3	ORGANIZATIONAL STRUCTURE OF THE INDUSTRY AND THE JOB MARKET ..	11
3.4	CATEGORIES OF EMPLOYMENT AND CHARACTERISTICS OF LABOR	13
	STRUCTURE OF JOBS.....	13
3.5	ANAPEC: PROFESSIONAL PLACEMENT PROGRAMS	14
4	TRAINING PROVISION	17
4.1	INITIAL TRAINING	17
4.2	ONGOING TRAINING	20
4.3	THE TRAINING SCHEME	20
	CONCLUSION	23

PRIORITY AREAS OF ACTION	24
BIBLIOGRAPHY.....	27
APPENDICES	29
APPENDIX 1: LIST OF AGENCIES & COMPANIES	31
APPENDIX 2: POTTERY-CERAMICS TRAINING PROGRAM	33
APPENDIX 3: ASSOCIATIONS AND COOPERATIVES –POTTERY INDUSTRY –SAFI.....	35
APPENDIX 4: LIST OF BUSINESSES IN THE SAFI POTTERY INDUSTRY	37
APPENDIX 5: ANAPEC: PROGRAM SHEETS.....	39

THANK YOU

We would like to express our gratitude to the professionals who generously agreed to host us in their businesses and allow us to participate in their discussions. We also wish to give special thanks to the representatives of the region's institutional bodies for their valuable contributions and recognize the special support of the Regional Handicraft department.

I INTRODUCTION

I.1 MOROCCO ECONOMIC COMPETITIVENESS PROGRAM (MEC)

The USAID MEC program for economic growth is focused on developing Morocco's economic competitiveness by reducing barriers to trade and investment. Based on a multi-sector approach, this program is comprised of three components with an overall aim of providing support for key reforms and establishing the public-private partnerships necessary for sustainable economic growth.

The first component supports the Morocco's business climate through improved trade and investment. The second promotes sustainable water management practices in agricultural growth. The third MEC program component focuses on workforce development, specifically in efforts to increase the number of new hires, especially among youth, and the number of start-ups established by entrepreneurs who have received training.

I.2 SUMMARY OF EXPLORATORY STUDY OBJECTIVES

This exploratory study falls under the third MEC component—its overall purpose is to promote economic growth in Safi in the Doukkala-Abda region by identifying issues and providing concrete recommendations on skills-development and labor needs of the private artisanal pottery industry.

The objectives of the exploratory study are to: (i) assess the availability of skilled labor relative to market demand; (ii) evaluate the demand for employment opportunities by young people (iii) identify gaps between the labor needs, employment seekers and training supply in the pottery industry. This report provides recommendations to address these gaps to promote sustainable economic growth in the pottery industry in the Doukkala-Abda region.

This exploratory study identifies possible project components that, in partnership with local actors, can support the pottery industry in Safi. It constitutes a preliminary phase in the shaping of an action plan that will be launched following the development and validation of this project by various partners.

This document is divided into four parts. The first part presents the Secretary of State for Handicrafts' national handicraft development plan, Vision 2015, and the activities undertaken so far to develop the pottery industry. The second part focuses on the characteristics of the pottery industry in Safi, the employment situation, and the skilled labor needs. The third part provides information on the current state of training provision. The general findings and recommendations are presented in the conclusion.

I.3 ELEMENTS OF METHODOLOGY

DEFINING THE FIELD OF RESEARCH

The Moroccan artisanal industry is divided into two major sub-sectors. One, called craft service, includes professional activities such as hairdressing, car repair, and plumbing. The other sub-sector includes both decorative and utilitarian crafts with a Strong Cultural Component (FCC). The products and manufacturing techniques in this sub-sector have a long traditional background and create high added value as products that are a part of Morocco's cultural heritage. The study focuses on the field of artisanal pottery in this latter sub-sector, specifically on ceramics from the town of Safi and its surrounding region.

The definition of artisanal products used within the framework of the national handicraft strategy is the following:

“The term handicraft means made by artisans, either completely by hand or by using hand tools or even mechanical means, provided that the direct manual contribution of the artisan remains the most important component of the finished product. These products are produced without restrictions in terms of quantity and by using raw materials from sustainable resources. The special nature of artisanal products is derived from their distinctive features which can be utilitarian, aesthetic, artistic, creative, cultural, decorative, functional, traditional, symbolic, and important from a social perspective.”¹

The terms artisan and artisan activities were defined with the establishment of the artisan consulate chambers (Dahir [Decree] No 194-63-1 of June 28 1963, amended by the Dahir No 86-97-1 on April 2 1997). According to these texts:

“...an artisan is considered to be any person whose principal and regular activity is engaging in an occupation whose manual character is dominant in the production, processing, or supply of services...”

The study focuses on the artisanal production of utilitarian and decorative pottery objects. It does not examine the industrial ceramics industry.

DATA COLLECTION METHODS

The main methods of data collection were document research and analysis as well as exploratory talks with principal actors in the region, supplemented by interviews with a sample of private sector companies and entrepreneurs. The number and selection of interviewees was shaped by their relevance to the artisanal pottery industry, their structure and profile, and their availability within the timeline of the study. In collaboration with regional actors (Delegation de l'artisanat and la Chambre professionnelle de l'artisan) the companies were selected on the basis of their representativeness of the handicraft sector and their role in industry development. Two female entrepreneurs were included in the interview sampling.

The sample covered various types and sizes of organizations, including SMEs, very small businesses (generally called “mono artisans”) who have very small workshops located in the Chaâba Valley and Potters Hill, young artisan entrepreneurs belonging to a cooperative, and members of an Economic Interest Group (EIG). The list of organizations and companies can be found in the first appendix of this document.

This report includes data analysis results obtained during the desk study. Quantitative data and statistics are mainly sourced from monographs, studies, and documents obtained from various institutional organizations, as well as newspaper articles. The websites of the town of Safi and the region of Doukkala-Abda, the Secretary of State for Handicrafts (SECA), the Maison d'Artisan, and the National Handicraft Observatory have also been used. Various documents were consulted on the websites of international organizations that have done recent research on the job market and handicraft industry in Morocco.

¹ Definition adopted by the UNESCO / ITC Symposium on Crafts and the international market (Manila, Philippines, October 1997)

2 BACKGROUND

2.1 NATIONAL STRATEGY FOR HANDICRAFT DEVELOPMENT

Handicrafts are one of the eight industries identified as growth drivers in Morocco under the Emergence Plan, a 2009-2015 strategy for the promotion of the industrial sector. Similar to the Green Morocco Plan in the agricultural industry, Vision 2015 is a national strategy that is part of a deliberate government growth policy with the priority objectives of new job creation and socioeconomic growth.

The handicraft sector in Morocco employs more than 2.1 million people, or 20% of the active population. Handicrafts with a strong cultural component represent 16% of the workforce. This strategic sector is considered to have an important role in human development, the fight against poverty, and social exclusion.

The Vision 2015 strategy identifies three main areas for government action in this industry,² including:

- Supporting the creation and growth of producers and reference actors that would contract with the State, the distribution network, and defined obligations for each party;
- Supporting the structuring and creation of the Small and Medium Enterprises (SME) sector. Support for SMEs can take three forms: production aid, sales support, and funding assistance;
- Supporting individual rural or urban artisans' production, including improvements to *production quality* and *work conditions*.

Projections for 2015 estimate the industry's GDP to be at more than 10 billion dirhams, an annual growth of 6% while creating 117,000 jobs. The implementation of the strategic plan has been backed by more than 110 million USD as part of the Millennium Challenge Corporation (MCC).

The key objectives of Vision 2015 are the following:

- Doubling the turnover of handicrafts with cultural content
- Multiplying formal exports by 10
- Generating 4 billion dirhams of additional GDP
- Creating 117,500 jobs, including:
 - o 37,200 new jobs generated by Small Scale Producers,
 - o 13,750 jobs created by SMEs,
 - o 66,500 new mono artisans and employees of very small businesses
- Creating 300 companies with 15 to 20 reference actors and 15,000 micro-enterprises

2.2 VISION 2015: ARTISANAL POTTERY INDUSTRY ACHIEVEMENTS

Vision 2015's main achievements in 2008 related to Safi's pottery industry were:

² 2008 Annual Report, Maison de l'Artisan.

- In improvement of production techniques, several Safi potters benefited from the acquisition of technical equipment to modernize their production capabilities. The Secretary of State also organized a pilot workshop for pottery-ceramics in Safi.
- To improve access to quality raw materials, an action plan was made to address the problems associated with clay. Activities were undertaken to assess the feasibility of creating cooperatives that supply raw materials.
- Standard-setting was enacted to increase the competitiveness of Moroccan handicrafts and improve their quality. This included seven standards that address the ceramic pottery industry. Standards for thermal ovens for artisans were made mandatory.
- The “MADMOUN” certification system was introduced for pottery, ceramic tableware, and food-safe ceramic bakeware.
- An awareness campaign was implemented to educate artisans about the dangers of lead and cadmium to human health and the need to respect mandatory limits and enforcement standards.
- To encourage creative artisans a pottery-ceramics trophy was awarded—the first and second award events took place in Safi.
- A collective certification mark for tagines was registered under a partnership agreement with the Moroccan Office for Industrial and Commercial Property.
- Three Research and Development agreements to provide solutions to technical problems in the pottery-ceramics industry have been completed or are underway. These projects involve:
 - Improving pottery machinery and production techniques (Safi School of Technology at Cadi Ayyad University);
 - Designing a traditional gas oven (Mohammedia Engineering School);
 - Studying the lead and cadmium emissions from pottery products (Technical Center of Construction Materials)

Actions have been taken to improve the working conditions of mono artisans specifically in promoting access to finance, medical insurance, a pension at retirement, and to improved hygiene, health, and safety at work.

- *Access to finance*: A project to create a guarantee fund to facilitate SME and mono artisan’s access to credit; micro-credit loans offered by four organizations and funding and investment loans offered by three banks;
- *Social security*: The marketing of 4 insurance products, including “INAYA”, which starts at 45 dirhams/month for adults and 36 dirhams/month for children. Two insurance products were also released in the market with insurance premiums starting at 42 dirhams/month for adults and 33 dirhams/month for children.
- *Hygiene, health, and safety at work*: Mandatory standards were adopted for gas ovens used for baking pottery, and a safety audit operation was initiated on Potter’s Hill in Safi.

It should be noted that during the Vision 2015 Pilot Committee member’s meeting (February 2012), steps were taken to address the current constraints hindering the implementation of social programs and access to funding tailored to the conditions of mono artisans.³

2008 Annual Report, Maison de l’Artisan.

February 22, 2010

2.3 THE ARTISANAL PRODUCTION PROGRAM OF THE MILLENIUM CHALLENGE CORPORATION

In addition to the vision 2015 activities that effect artisan potters in Safi, the Secretary of State for Handicrafts' work is supported by a program under an MCC agreement. This program, *Artisanal Production*, supports the pottery-ceramic trade while addressing the environmental and social concerns of the industry.

With a budget of \$9,573,750, the *Artisanal Production* program is designed to help potters from the towns of Fez and Marrakech invest in non-polluting modern equipment and techniques. MCC funding supports:

- A technology transfer package, which includes a modern oven demonstration, business management techniques, and training in modern techniques of production, design, and marketing;
- Funding for the acquisition of new gas ovens;
- Technical assistance to facilitate potters' access to the financial services provided by local banks and micro-credit organizations.

The implementation of this project was conducted in coordination with the Industrial Pollution Control Fund (FODEP) fund for the environment and other partners who provided additional funding of almost \$2.5 million for grants to cover 40% of the price of a modern oven.

3 THE SAFI ARTISANAL POTTERY INDUSTRY

This section of the report includes data on the artisanal pottery industry in Safi, including its organizational structure, labor needs, and employment promotion activities of the National Agency for Promoting Employment and Skills (ANAPEC).

3.1 SEVERAL STATISTICS ON THE HANDICRAFTS INDUSTRY

The statistical data and graphs presented in this section are mainly sourced from the National Handicrafts Observatory and the Bulletin of Exports' publications from early 2007. This data is on the turnover (sales), the volume of jobs, and the number of companies. It provides an overview on the volume of artisanal activities in the town of Safi in relation to the entire sub-sector of FCC Moroccan handicrafts.

SALES AND JOB VOLUME

The FCC artisanal activities in Morocco are mainly concentrated in the four cities of Casablanca, Marrakech, Fez, and Rabat-Salé, which are high-productivity centers of structured artisanal SMEs. In addition to these four areas, which cover almost 80% of the industry's employment, eleven other provinces are known for their artisanal activities. These latter provinces, including the town of Safi, account for 20% of employment.

According to the latest available statistics in 2007, the FCC artisanal sector sales reached 10.4 billion dirhams, an increase of 6.3% compared to 2006.⁴ Mono artisans represented nearly 80% of the industry's total sales. According to available data, an artisan's average annual in sales is 30,000 dirhams. This amount increases to 36,000 dirhams when the full sales/employee ratio is considered.

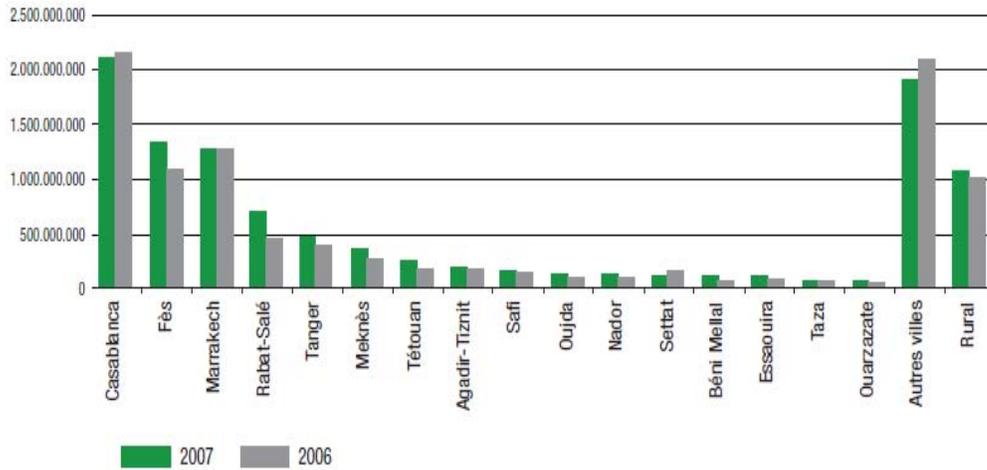
In 2007, Safi's artisanal industry displayed a growth rate of 1% over 2006, to reach sales estimated at 147,139,921 dirhams, and nearly 5,011 jobs. The tables below display the position of Safi in relation to other productivity centers in the industry.

The first table contains information on the sales assessment for 2006-2007; the second provides the growth rate by city for 2007

“Growth rate of sales by city”

⁴ Observatoire National de l'Artisanat 2007

EVOLUTION DU CA PAR VILLE



Revenue growth by city

Ville	CA	%
Urbain	9.311.853.278	90%
Casablanca	2.102.178.557	20%
Fès	1.331.282.360	13%
Marrakech	1.260.935.232	12%
Rabat -Salé	681.416.319	7%
Tanger	448.688.116	4%
Meknès	348.074.885	3%
Tétouan	243.310.145	2%
Agadir - Tiznit	190.468.822	2%
Safi	147.139.921	1%
Oujda	117.709.690	1%
Nador	112.262.480	1%
Settat	109.749.785	1%
Béni Mellal	104.133.218	1%
Essaouira	97.254.490	1%
Taza	62.200.370	1%
Ouarzazate	41.056.504	0,4%
Autres villes	1.913.992.384	18%
Rural	1.070.741.373	10%
Total	10.382.594.651	100%

The organizational structure of artisanal activities mainly consists of workshops or micro-enterprises that are composed of mono artisans. Production SMEs constitute a small portion of the industry, evaluated at 400 units in 2007.

In 2006, the town of Safi had 8 SMEs, 3% of the national volume. According to 2007 employment volume data, the number of jobs allocated to Safi's artisanal sector (including pottery) totaled 5,011.

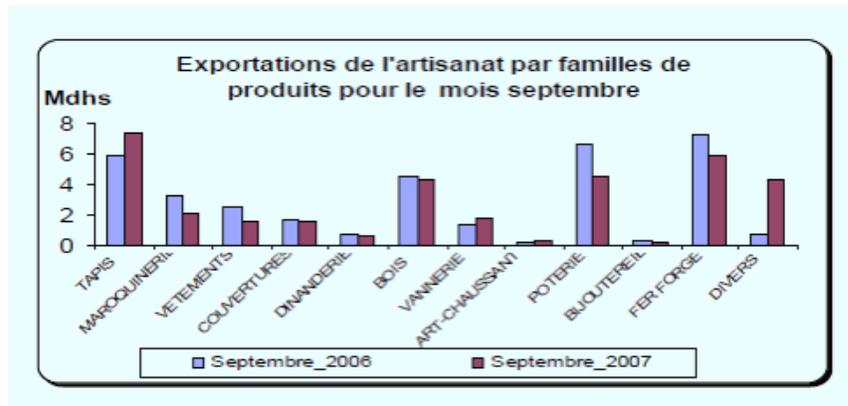
Number of SMEs registered in Safi (please include the corresponding table)

Employment volume for 2007 (please include the corresponding table)

According to the latest Safi monographs, the number of companies categorized as SMEs grew from eight to 15, an increase of almost double, over an estimated period of three years (See Appendix 4: List of SMEs –Town of Safi).

EXPORT ACTIVITIES

Export of artisanal products is an important source of income for the country. However, according to the data for September 2007, exports for the entire industry decreased slightly by 1% compared to September 2006. This overall decrease is attributed to a decline in pottery (-31%), wrought iron (-19%), and leather (-34%). The following table shows artisanal exports by product:



Artisanal Exports by Product

Overall, the annual turnover for exports saw a decrease of 4%. According to information obtained from the Secretary of State for Handicrafts, this downward trend continued for the first months of 2008, a decrease attributed mainly to competition from Asia.

Certain sectors, such as carpet and wrought iron, are facing competition from Nepal and India. The pottery sector is faced with both international competition from Asia and regional competition from other North African countries. During interviews with Safi professionals, reference was made to the nearly 1,400 Moroccan potters who have left the country to practice their craft in Tunisia. Those artisanal products that are exported from Safi are transported via freight forwarders located in Casablanca, Marrakech, or Tangier.

3.2 THE REGIONAL INITIATIVE PLAN FOR HANDICRAFT DEVELOPMENT

The national strategy is implemented at the regional level through regional handicraft development plans. Part of a convention between the Government, the Region, the Chamber of Handicrafts,

Local Authorities, and local organizations,⁵ these action plans are based on a region's tourism potential, components of which include its mono artisans and artisanal industry.

The Doukkala-Abda regional handicrafts development plan, developed in March 2008, contains a pottery industry development plan with the following components:

- Upgrading the Center for Professional Training in the Traditional Arts (CQPAT):
 - Providing accommodations;
 - Installing technical equipment;
 - Developing general and technological courses;
 - Developing an information system;
 - Developing an intern and laureate placement system;
 - Upgrading human resources;
- Implementing Research and Development projects:
 - Partnering with the Safi School of Technology to implement R&D activities;
 - Developing technical expertise, particularly for the problems of shard cracking in ceramic products;
 - Implementing the existing technical equipment prototypes located in Safi's vocational and educational handicraft training center.
- Promoting the SME and very small business sector:
 - Holding the 1st and 2nd annual ceramic awards (2007-2008);
 - Supporting participation in fairs and exhibitions;
 - Conducting a study on and providing technical assistance for developing the clay tile market in the rural community of Saadla, in the Safi province;
 - Inaugurating a Pilot Support Workshop for Innovation and Creation associated with CQPAT;
 - Establishing of the "MADMOUN" collective certification brand with artisans;
 - Creating a 2009 ceramic Collection Catalogue to promote new product design.
- Production site development projects:
 - Developing the pottery market in Dar Sikar, Safi medina;
 - Rehabilitating and developing Potter's Hill;
 - Developing a new "Potter's Village" website and relocating potters from the Chaâba valley.

The proposed production site enhancement and development of the "Potter's Village" are underway, with a 10 year timeline. This new production site is for potters relocating from the Chaâba valley to an artisanal zone around Sidi Abderrahmane. This project, which brings potters closer to clay pits, will include the creation of infrastructure and social programs and will minimize environmental pollution by through the use of a gas oven.

Currently this project is facing some resistance from artisans in the valley who fear a financial obligation will be expected of them beyond their ability to contribute. They request a guarantee of access to social programs and funding for the acquisition of gas ovens.

The current state of workshops in the Valley demonstrates a clear need for the activities proposed in the regional development plan. Warehouse conditions are precarious, inconsistent with the quality and productivity requirements set in the market, and are also incompatible with the SME

⁵ 2008 Annual Report, Maison de l'Artisan

subcontracting development objectives. According to the information obtained through this study, only 15 of 75 workshops have access to water and electricity. The current working conditions and status of this site's workshops convey an image of an archaic industry that is unattractive to young people. This is an unfortunate consequence as, paradoxically, this industry holds important potential for Safi's economic development.

Mono artisans compose the overwhelming majority of the production fabric in the artisanal pottery industry. Intensifying the activities of SME's subcontractors without first improving working conditions and production capacities will detrimentally affect SME growth goals and could undermine the industry. All regional actors fear the loss of the artisan potter trade—the main threat to its survival are the poor working conditions in production workshops.

As the industry faces greater competition in the international marketplace, it has increased its adoption of export standards and systems related to improved working conditions. Capitalizing on this trend could promote the security of the industry's future.

There is a demand in the international market for respecting the environment by reducing air pollution and while maintaining productivity and product quality. Gas ovens can help address this demand—it has been shown that using one can save 30% to 50% on production costs. Its longevity is 25 years, compared to a 5 years with traditional ovens. Unfortunately, the cost of acquiring a gas oven can be prohibitive for mono artisans. In 2009 the average cost of a 4 sq. meter oven (140 cu feet) ranged from 200,000 dirhams to 300,000 dirhams⁶.

In recent years, experimental communal oven installation projects that help mitigate the high cost of gas ovens were undertaken in various areas, including Marrakech, Fez, and the Salé Oulja Complex. The Salé Oulja Complex is comprised of 700 artisans and 57 workshops equipped with 95 ovens, ten of which are gas and four electric. The project cost of installing a communal oven, which is fired three to four times per week, is estimated to be 500,000 dirhams. This project benefits six potters, selected for their willingness to contribute financially to the project, the proximity of their workshops from the oven, the similarity of their production, and their commitment to discontinue their use of traditional ovens. The Secretary of the Environment considered the pilot phase of the project in Salé to be complete and hopes to generalize this experience on other sites.

This pilot approach, also replicated in Marrakech and Fez, could be used to support artisans involved in the relocation project and their regional representatives by allowing for uninterrupted production and development of their pottery activities. The Chaâba Valley is the largest production site in terms of the number of potters, with nearly 800 artisans. The pottery network, which includes collaborators and their employees, is an important source of income for many families. The productivity and competitiveness of many SME exporters is directly related to these artisans and their working conditions.

3.3 ORGANIZATIONAL STRUCTURE OF THE INDUSTRY AND THE JOB MARKET

Handicrafts in Safi, including the service sector, employ more than 40,000 artisans. This represents nearly 52% of the workforce in the province and is indeed an essential component of the region's socio-economic environment.

Favored by an abundance of raw material and recognized as a cultural and artistic heritage site, Safi has become a capital of Moroccan pottery. This industry's status as an economic mainstay in the region is due to the convergence of artisan activities and tourism found in the National Museum of Pottery and Ceramics and Potter's Hill. Its classification as a historical monument, and more recently, serving as the location of the first International Symposium on Ceramics at ENSAS are indicators of its importance in the country.

⁶ Pilot project carried out in Oulja Complex in Salé

The main products produced in Safi are decorative items (jars, vases, candle holders, etc.), art and table objects (tableware, tagines, bowls, etc.), and building products (bijmat, tile, zelig, etc.).

The clientele are mainly domestic customers, such as households, traders, wholesalers, hotels, restaurants, government offices, visiting tourists, and foreign markets in search of authentic handicrafts who know that Safi pottery is internationally renowned.

As in many handicrafts sectors, particularly carpet and wrought iron, pottery is facing increased competition. For Safi pottery, competition comes from other production sites in Morocco and abroad—particularly from Asian countries, but also North Africa. In addition, substitution products have become a source of competition in the marketplace.

The marketing and distribution channels are weak for the entire industry, including for many SMEs, which creates a unique disadvantage for the mono artisan. Faced with a lack of finance to market their own products, mono artisans are obligated to sell to intermediaries who then deal with wholesalers or retail traders. The succession of intermediaries between buyer and artisan is just one of the issues that must be considered in a project supporting industry development.

According to obtained data, the field of pottery in the Safi Province employs nearly 2,000 artisans permanently. This does not count associated employment that is created, which professionals estimated to average ten direct jobs. A high volume of seasonal employment also characterizes this industry. Some of the companies visited see their employment double in the high season.

The main pottery production sites are located in the in the districts of Safi, such as the village of Sidi Abderrahmande located near the town, and on the road to Marrakech. The distribution of workshops between the main sites can be seen in the following table:

Main production sites – Safi:

Sites	Number of artisans	Number of workshops	Number of gas ovens	Number of traditional ovens	
				Operating	Stopped
Potter's Hill	700	42	28	06	66
Chaâba Valley	800	75	04	30	50
Route Dar Si Aissa	77	08	19	04	-
Rural community of Saâdla	155	34	01	53	-
Route Marrakech	170	09	17	06	-
Route Sidi Bouzide	130	05	08	05	-
Total	2 032	173	77	104	111

The productive fabric of the industry consists mainly of mono artisans and a smaller number of SMEs. In most cases, potter's workshops are very small family-based businesses. The tools are simple, non-mechanized, and some activities—such as clay preparation—remain dependent on the temperature.

Mono artisan production lines are poorly organized, their micro-enterprises unstructured and their organizational fabric undeveloped, which puts them in a precarious position. The number of cooperatives operating in the pottery industry is four, composed of 166 members, whereas the estimated number of artisans for the same time period is 2,000 potters. There are nine

professional organizations which bring together 133 members (see Appendix 4: Lists of cooperatives and organizations).

There were eight SMEs⁷ in Safi in 2006, a number which nearly doubled by 2010 to reach 15 SMEs. (See Appendix 5: List of companies in the pottery industry in Safi).

Although these companies have export activities and a higher employment volume, they also have marked weaknesses in labor organization and production capacity. Similar to the situation of mono artisans, the entire production chain needs to undergo technical strengthening, particularly in clay preparation stages and firing conditions, which have a high rate of product loss due to breakage.

According to the National Strategy for the Development of Handicrafts, SMEs play a crucial role as drivers⁸ for structuring and modernizing the industry. As expected at the national level, business principles play a key role in the industry, both capitalizing on niches left by large companies and subcontracting part or stages of their production with mono artisans. Mono artisans are considered to be a pool of skilled manpower for more structured SMEs.

As previously mentioned, the poor current working conditions for mono artisans undermines this dynamic. SME competitiveness is directly related to production capacity and therefore to the working conditions of mono artisans. Export markets are increasingly subject to certification and labeling standards which take into account manufacturing conditions and social dimensions of work. Labeling associated with cultural development product marketing has the potential to generate revenue for artisanal businesses while promoting the sustainability of cultural heritage. The incorporation of these standards into the industry must be supported, as they are a key to addressing the demand in foreign markets that seek out this type of cultural product.⁹

Combined with the productivity and product quality needs, these existing labeling and standards systems are increasingly demanded for export, which reinforces the need to prioritize supporting mono artisans. Improving their networks, working conditions and production capacities will allow them to develop traditional Safi pottery as a value-added product that is in demand in foreign markets.

3.4 CATEGORIES OF EMPLOYMENT AND CHARACTERISTICS OF LABOR

STRUCTURE OF JOBS

The job structure is associated with the stages of production. The main stages are:

- Preparation of the clay
- Shaping (by molding and on the wheel)
- Decoration (glazing and hand drawings)
- Firing
- Sales

⁷ Observatoire National de l'Artisanat, Panorama de l'Artisanat, 2006

⁸ According to an industry study carried out by UNIDO, are considered the following categories of companies: Large: more than 15 employees. Medium: 6 to 15 employees and small: 1 to 5 employees

⁹ Chambre des Beaux Arts de Méditerranée, PRODECOM, 2002

Little data is available on the structure and characteristics of employment in this industry. The table below presents the percentages of employees by stage of production for medium and large businesses.¹⁰

Percentages of employees by stage of production:

Preparation of the dough	Shaping	Decoration	Cooking	Sale
10 %	25 %	50 %	10 %	5 %

Decoration work (glazing and painting the products) has the largest number of employees, followed by shaping, which requires the specific expertise of working on the potter's wheel.

Jobs can be broken down into two categories based on training requirements. Those that require little training fall into the first category, which includes preparation, processing, and clay handling. The second category includes the jobs related to product decoration and those that require years of potter's wheel training.

Both of the jobs in these latter categories require specific skills. The role of master potter requires skills acquired after years of training, while those related to product decoration require special training in drawing techniques and finishing. Sales activities are generally performed by the entrepreneur.

According to data collected by interviews with entrepreneurs, the workforce is mostly made up of unskilled workers, ranging in age from 16 to 73 years. Employers identified ongoing training needs for their employees in health and literacy.

Two out of six entrepreneurs interviewed in this study were women. In three of the companies visited, 30%, 20%, and 13% of jobs were held by women, mainly in product decorating positions.

The number of jobs in the companies visited varied from nine to 50 permanent employees. The cooperative had seven artisan members, each employing around 12 people. All interviewed entrepreneurs reported a decline in activities attributed to the economic crisis. All had reduced their number of employees and, to date, none expect to hire except for one company that plans to hire an administrative assistant. There was consistent agreement that the skilled labor currently available on the market is sufficient in the short to medium term.

Unlike other upstream operations that could eventually be mechanized, two characteristics of artisanal products are their designs and decorative motifs, which are made by hand. In response to requests for products with new designs, a potential demand for jobs in product decoration can be anticipated, as well as training in creating and marketing new designs for artisans who design their own product lines.

3.5 ANAPEC: PROFESSIONAL PLACEMENT PROGRAMS

The National Agency for Promoting Employment and Skills (ANAPEC) offers three placement and employability improvement programs for young unemployed people and hiring businesses.

The *Taehil* program offers such services as skills training and retraining, as well as support in finding contracts for employment. The *Idmaj* program is aimed specifically at finding young graduates employment through placement contracts. The *Moukawalati* program supports the creation of Very Small Businesses. Summary sheets on each of these programs are presented in Appendix 5 of this report.

¹⁰ Industry study (ONUDI)

The Safi agency's registered achievements for each program in 2008 are as follows: the *Idmaj* program had 72 placement contracts; the *Taehil* program provided skills training to 100 beneficiaries but had no beneficiaries of informal training; and the *Moukawalati* program supported four start-ups.

Although mono artisans face difficulties in production organization and marketing, there is not a demand for employee training in the pottery industry, and according to reports, none of ANAPEC's activities are related to this sector.

A combination of the industry's decrease in activities and hiring patterns can explain ANAPEC's absence. As confirmed in interviews, it is common practice for employers to recruit by posting hiring needs on their businesses' door or by word of mouth.

A prospective study on employment in various regions is currently underway. According to preliminary results, employment growth industries in the Safi province are tourism (hotels and restaurants), the chemical industry, construction and public works, and food processing where ANAPEC has been requested to provide training in the canning sub-sector.

Information on the pottery industry indicates that the labor issues are connected to a production base mainly populated by mono artisans, a lack of structure, poor working conditions, little presence of grouping in the form of cooperatives, and the absence of an EIG.

Nevertheless, there is employability potential for young people. Supporting existing groups of young artisans is critical, through improving the production, design and quality of products, improving and promoting association management, and facilitating accessing to finance and social programs.

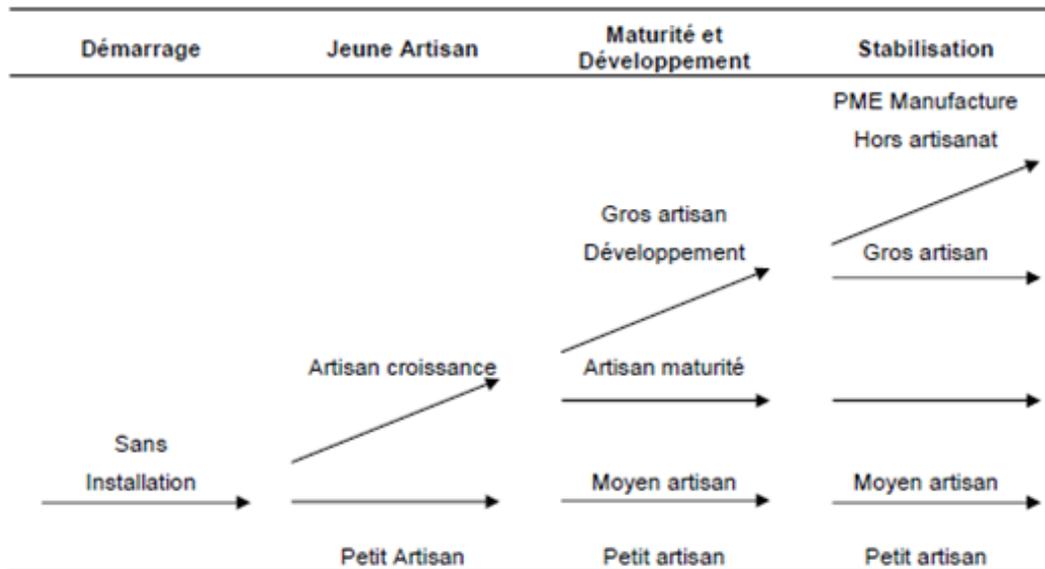
According to a study by the International Labor Office on the handicrafts industry, the creation phase of a beginner artisan's micro-enterprise is often spread over a period of one to two years. At this stage an *incubator* style program can be effective in the micro-enterprise's stabilization and growth. In the incubator program the beginner artisan needs support from master artisans, prompting the adoption of "learning by doing" as the main pedagogical strategy.

After consolidating their micro-enterprise's activities, the *beginner artisan* can identify strategies and opportunities that allow them to transition into a young artisan with longer-term employment prospects.

The table below shows the different stages in the development of an artisanal micro-enterprise.

Diagram of the evolution of the artisanal dynamic¹¹ (in French):

¹¹ From the study carried out by the International Labour Organization, Focus Program on Promoting Employment through Small Enterprise Development, Department of Job Creation and Enterprise, Geneva, 2002



This means that, as a mono artisan-dominated sector, it is more relevant to talk about growth strategy than employment potential in the pottery industry. It appears that job creation can be achieved through promoting young working artisans, especially pre-existing young artisan groups.

Similar to the national strategy that focuses on support for SMEs as a flagship model, an ideal strategy would focus on professional placements for young people in the pottery industry. It would also build support for young working artisan cooperatives to cultivate the perception that employment in the pottery industry is desirable, and that pottery associations and cooperatives are beneficial young potters and mono artisans.

4 TRAINING PROVISION

4.1 INITIAL TRAINING

The Safi province has a Center for Professional Training in Traditional Arts (CQPAT) that provides ceramic pottery training. This facility has a capacity of 60 seats and has 30 students per year.

Currently, training is offered at two diploma levels, a qualification level and a specialization level, each requiring two years of training. The eligibility conditions differ depending on the diploma level and the training mode (apprenticeship or in-house), thus providing flexibility for candidates.

ELIGIBILITY CONDITIONS ACCORDING TO MODE OF VOCATIONAL TRAINING

In-House Training	Apprenticeship Training
Specialization Level:	Specialization Level:
<ul style="list-style-type: none"> - Age: 15-20 years - Grade: 6th, 7th, or 8th year of basic education or a professional introductory certificate or equivalent diploma - Conditions of admission: Competitive entrance exam - Training duration: two (2) years 	<ul style="list-style-type: none"> - Age: At least 15 years - Grade: At least the end of 6th year of basic education
Qualification Level:	Qualification Level:
<ul style="list-style-type: none"> - Age: 25 years and older - Grade: Between the 9th year of basic education and the 2nd year of secondary school or an equivalent diploma - Conditions of admission: Competitive entrance exam - Training duration: Two (2) years 	<ul style="list-style-type: none"> - Age: At least 15 years - Grade: At least the end of 9th year of basic education

As determined in the national strategy for restructuring the industry, vocational training is offered through both the in-house and apprenticeship modes. Apprenticeship training is organized so that 20% of it takes place in institutions and 80% in a company, while in-house training takes place in the CQPAT.

According to training officials and professionals, apprenticeship opportunities have become increasingly difficult to arrange due to a lack of host companies. For the nine apprentices registered in 2010, there were five host companies. One issue, according to entrepreneurs, is that apprentices cause losses that detrimentally affect production. However, institutions and professionals both fear the disappearance of potter's wheel skills. These skills, which are the heart

of the artisan potter's trade, are acquired by learning from a master artisan during an apprenticeship.

The 2008-2009 and 2009-2010 staff tables, seen below, show that the number of apprentices decreased nearly 70% from 31 to nine. The ratio of home businesses varied from 61% to 55% for 2010. This finding also confirms the information obtained from officials on the high dropout rate of candidates after an initial stay in their workplace. Poor working conditions are cited as the main factors of youth withdrawal and contribute to the lack of interested candidates.

Statistics on placement and employment rates are not available, although there is information that the placement rate of successful training participants is the highest. They are hired primarily for jobs related to the finishing stage of glazing and product decoration.

APPRENTICE STAFF TRAINING FOR THE 2008/2009 FISCAL YEAR

STAFF UP TO 31 JANUARY 2009

Trade	Training level	Number of host companies	NUMBER OF APPRENTICES IN TRAINING			
			1 st year		2 nd year	
			Total	Total women	Total	Total women
Pottery	Qualification	19	15	03		
	Specialization		16	02		
TOTAL			31	05		

TRAINING BY APPRENTICESHIP

TABLE OF REGISTERED APPRENTICES AND HOST COMPANIES FOR THE 2010 FISCAL YEAR

Province / Community	Trades	Number of apprentices	Number of host companies
CQPAT - Safi	Ironworks	18	10
	Carpentry	28	20
	Sewing	33	19
	Pottery	09	05

A new training program for the pottery industry was revised according to the skills approach and is currently implemented in institutions. This programming approach was developed by Morocco in 2004 in order to create better alignment between the training scheme and the skilled workforce needs in the employment market.

This new program is structured in modules based on the skills identified and validated by professionals as necessary to work as for a ceramic potter. The ceramic potter designs and manufactures individual pieces or series for ornamental, decorative, or utilitarian use. They apply a variety of traditional techniques with some machine use, but primarily using hand tools. Potters are trained to do their work for various types of production, including as mono artisans or for an SME. APC training is also available for administrative and training staff. The training program synthesis is presented in Appendix 3 of this document.

CQPAT is part of a complex dedicated to pottery. The center is attached to the industry's Support Workshop for Innovation and Creation. This workshop is set up under the regional development sector, and has a total of 2.5 million dirhams worth of specialized production equipment. Besides its contribution to development and research, it offers educational materials with the potential to help upgrade both established artisans and youth entering into training.

The Vision 2015 strategic plan provides incentives to host companies providing apprenticeship training through:

- Non-taxation for CNSS apprentices;
- Training center support for insurance against work accidents and occupational health issues;
- Exemption from the FP tax for allocations to apprentices;
- State support for training for apprentices' masters;
- The apprentice's commitment to work on behalf of the host company for a period agreed upon by both parties;
- The State's tax-free financial contribution to handicraft companies that embrace jobs and qualifications set by the administration.

Greater awareness of these measures among future entrepreneurs could strengthen the number of host businesses willing to participate in apprenticeship training.

4.2 ONGOING TRAINING

By 2015, through the national strategy, the Secretary of State will have provided 54 training sessions for 1,080 artisans, or 3,240 hours of training in five crafts including pottery-ceramics as well as in weaving, leather goods, jewelry, and carpets.

Through the national strategy, during the 2010 fiscal year the mono artisan training program organized 40 training sessions for 800 artisans working in various trades, including those in pottery-ceramics. The areas covered in the national strategic plan for artisan training are: technical training, design, creativity and innovation, quality control, management (accounting, marketing, etc.), health, work safety, the right to work, and computer skills.

In collaboration with the Chamber of Handicrafts and the Handicraft Delegation, CQPTA organizes workshops create and grow artisans and pottery businesses. In recent years, the sessions focused on computer skills and the internet, accounting for small businesses, developing marketing materials, design and creation of new products, and manufacturing techniques such as casting, dragging, and shaping.

4.3 THE TRAINING SCHEME

The current training scheme, which includes the resources, training program, host capacities, and material organization, has the potential to meet the industry's skill needs. Having access to the facilities available in the workshop attached to the training center also offers the potential for development of practical professional skills.

It would be advantageous to support the center in the implementation and management of the new skills training program. Their approach includes access to technical equipment and provides services to both new artisans, including young beginners, as well as growth support for established potters. New and ongoing training resources could be used to support intervention actions that promote artisans and micro-enterprises' production capacities, quality control, and product innovation, as well as management and marketing.

This adaptation of the action plans to also apply resources to target interventions beyond training provision would help meet industry's employment needs. The usefulness of raising potential host businesses' awareness of the importance of and incentives for apprenticeships presupposes that there is a sufficient and stable cohort of interested candidates. The training programs' relevance is dependent upon the promotion of artisan pottery as a desirable trade. Supporting improved working conditions will strengthen the entire industry by reversing youth withdrawal and will promote the emergence of cooperatives or micro-enterprises that better value the industry.

To this end, CQPAT could promote and support the establishment of groups and cooperatives for youth through training and evaluate the feasibility of creating an *incubator* dynamic by involving a well-known regional or national master artisan, “maalem”, together with other regional actors such as ANAPEC.

CONCLUSION

This exploratory study was conducted to identify design elements for a capacity building pilot project supporting economic growth in the artisanal pottery industry, especially focusing on the participation of young people.

The handicrafts sector in the Safi province employs nearly 52% of the workforce. Among FCC artisanal products, pottery-ceramics are distinguished by their business volume, reputation, and the traditions associated with the history of the city. Furthermore, the convergence of tourism and handicrafts makes this industry an important economic pillar of the regional economy.

However, it appears that the decrease in activities in pottery SMEs has led to a reduction in employment, resulting in an experienced workforce pool available in the market. However, the main need in this mono artisan-focused industry does not really concern employment, but rather growth strategy adapted to artisans—especially young artisans. It is these young artisans, whether individuals or members of pottery groups, who hold the potential for creating jobs.

The proposed path to intervention is to maximize the potential of emerging young artisans and cooperatives to support mono artisan networks. To create successful reference models, including the *cooperative incubator* model, support should be given to existing young artisan cooperatives. This approach encourages healthy competition among both young and mono artisans that can serve as a catalyst for the emergence of cooperatives, economic interest groups, and pooling measures.

The impact could be multi-sectoral, making this approach applicable to other artisanal industries in Safi and other regions.

The handicrafts industry has the advantage of having clearly identified constraints faced by artisans. Several actions of the Vision 2015 Activities Report from 2008 focused specifically on the Safi pottery industry. The mobilization of regional actors and authorities to revitalize this industry indicates its importance in the region.

The current development approach for artisan potters supports the sustainability of a pilot project that reinforces existing mono artisan projects. This pilot project approach would not be separate from, but would rather integrate itself with, the current dynamics driven by regional and national handicrafts actors.

Aside from the commitment of regional actors and the industry's development dynamic, the current situation holds strong potential:

- The cultural heritage and expertise of nationally and internationally renowned Safi potters, making Safi pottery a regionally distinct value added product; this kind of *cultural product* is increasingly in demand in national and international markets.
- The presence of existing production and marketing activities that are the subject of restructuring and development projects—particularly the relocation of artisans in the Chaâba Valley, the Potter's Hill tourist attraction site, and the Sicar market located in the heart of the medina;
- The increase in the number of companies structured and categorized as SMEs over the last three years;
- The availability of infrastructure and resources dedicated to vocational training and advanced artisan training including additional training in human resources, and the provision of updated material resources;
- Partnership with the region's university for Research and Development in the pottery-ceramics industry and the promotion of this industry and the town of Safi through the International Symposium on Ceramics;

- The abundance of raw material which has led to the consideration of a proposed clay processing unit;
- The Qualification Center and the attached Support Workshop For Innovation and Creation, which serve as a complex dedicated to research and skills development. Infrastructure, specialized equipment, and resource materials are available for research activities, upgrading, and technical training.

According to professionals and 2007 data on the Safi artisanal industry, there are estimated to be nearly 2,000 potters who generate an average of ten employees per workshop. In the vast majority of cases, this employment is the source of a family's income. According to the most recent data, in addition to these potters there are 15 SMEs, an increase over three years from six SMEs .

Supported under the Vision 2015 plan, these businesses have increased the subcontracting of mono artisans. However, working conditions are poor enough that further outsourcing without first providing support to production conditions may weaken the industry. Increasing mono artisan incomes, as described in Vision 2015, begins with improving productivity and working conditions.

Emphasis on the production conditions of mono artisans in Valley workshops is key, as they are precarious and inconsistent with both the quality and productivity standards required by market rules, as well as the outsourcing development objectives. The current working conditions and state of workshops at this site convey an image of an archaic industry that is unattractive to young people although, paradoxically, it is an industry that has great potential for economic development in Safi. Intensifying subcontracting activities under these conditions without first improving the working conditions and production capacity of mono artisans would have an adverse effect not only on SME growth objectives but on the survival of the industry and the artisanal pottery trade. The productivity and competitiveness of SME exporters is directly related to that of mono artisans and, consequently, their working conditions.

In addition to growing competition in international markets, the standards and labeling systems related to export are increasingly integrating more rules regarding working conditions. Incorporation of these rules is the key to maximizing this industry's potential. Productivity, product quality, and export standards are vital to the industry's success. Therefore, it is important to improve mono artisans' networks, working conditions, and production capacities.

PRIORITY AREAS OF ACTION

Given the current situation and the development potential in the industry, two areas of intervention are identified as priorities:

- o Supporting the emergence of young artisan cooperatives and EIGs, by prioritizing support for existing cooperatives that can serve as leading models for mono artisans and youth;
- o Supporting the artisan relocation project from the Chaâba Valley to the Potter's Village.

Supporting the emergence of young artisan cooperatives and EIGs

As with the national strategy that focuses on the emergence of reference actors, the suggested approach is to focus on young artisan groups, giving priority to current cooperatives. This approach is aimed at encouraging healthy competition both among and beyond young people in the region, and to demonstrate the benefits of pooling to mono artisans. This approach would focus on the following:

- Providing technical support to improve production capacity and product quality;
- Supporting marketing and distribution channel development;
- Promoting artisan's pooling efforts in order to maximize resources including in social security, finances, distribution, supply, marketing, etc.;

These actions, undertaken with various regional actors including ANAPEC, should be implemented as part of an integrated approach aimed at identifying a potential networking model through:

- Evaluating the possibility of establishing an incubator cooperative-EIG program for junior artisans brought together around a recognized *maalem*;

- Evaluating the feasibility of a measure adapted to the specific problems of handicraft artwork, especially when dealing with a workforce that is unskilled and therefore ineligible for existing programs and information, as well as promoting the benefits of pooling, information, and support for network creation.

Supporting the artisan relocation project from the Chaâba Valley to the Potter's Village

- Examine the support project's budget for the pottery industry in the towns of Marrakech and Fez as well as the community oven installation project undertaken at the Oulja complex in Salé.
- Assess the possibility of duplicating and adapting the MCC Artisanal Production Chaâba Valley relocation program, as well as the activities for improvement of production conditions, and upgrading spaces, product quality, and production techniques.
- Review the ongoing study on the treatment of clay, improve availability of processed raw materials, and mechanize relevant operations; assess the feasibility of common standards for clay treatment and dough preparation.
- Support the implementation of pooling measures among mono artisans, particularly for social programs, access to funding, marketing, and supply.

In addition, this pilot project should integrate support measures for:

- Maximizing mono artisan's profitability and revenue through networking and pooling;
- Informing and supporting the establishment of an Economic Interest Group, either intra-sector or multi-sector (artisanal products from various sectors);
- Promoting quality and labeling standards, health and safety standards, and local support for artisans;
- Integrating a "tradition and culture" component to boost the industry's image and the reputation of artisanal pottery from Safi. Diversify product lines through creation and innovation, and promote the uniqueness of Safi pottery and the area's ability to provide national and international markets with authentic cultural products.
- Establishing a unit for SME and mono artisan management and marketing needs to strengthen the distribution and export channel;
- Providing functional literacy focused on concrete activities related to artisan activities.

Cross-cutting elements to support pottery industry growth

- Ensuring the project is part of a local approach;
- Designing the pilot project in partnership with relevant stakeholders, including young artisans;
- Including a local steering mechanism in project design that is founded on a participatory approach involving all stakeholders, including young artisans;

BIBLIOGRAPHY

- Kingdom of Morocco. Ministry of Economy and Finance, The Finance Bill for the 2009 Fiscal Year, Economic and Financial Report.
- Kingdom of Morocco. National Agency for the Promotion of Employment and Skills, Prospective Studies on Employment by Region, Doukkala-Abda Region, Preliminary Report on the Pre-Study.
- Secretary of State for Handicrafts and the Ministry of Tourism and Handicrafts, Management and Coordination, Division of Strategy and Programming, Strategy 2015, Panorama of Handicrafts 2006.
- Secretary of State for Handicrafts and the Ministry of Tourism and Handicrafts, Panorama of Handicrafts, 2nd edition of the National Handicrafts Observatory.
- United Nations Industrial Development, Polo Ceramico de Faenza Agency, Regional Investment Center of the Region Doukkala-Abda, National Agency for the Promotion of Small and Medium-sized Enterprises, Sector study “Ceramics industry in the Doukkala-Abda Region: From Analyzing Raw Materials to Developing a Marketing Strategy”. L. Agostini, V. Venturi, V. Ghinassi, G. Luciani, Coordinators: Ranieri and Giordano, October 2004 –May 2005.
- Kingdom of Morocco, Ministry of Tourism and Handicrafts, “Handicrafts: Which Strategy Will Lead to a Real Industry Boom?” Rabat, September 2005.
- Kingdom of Morocco, Ministry of Tourism and Handicrafts, Vision 2015 and Handicrafts: Our Authenticity, Our Growth Engine, 2006-2015 Contract program.
- 2006- 2015 Contract program, Regional Handicrafts Development Initiative. Doukkala-Abda region, Contract program 2008-2011.
- Kingdom of Morocco, Ministry of Tourism and Handicrafts Vision 2005, Summary of the “Vision 2015 Steering Committee” from February 27th 2009.
- Kingdom of Morocco, Ministry of Tourism and Handicrafts, Vision 2005, Summary of “Vision 2015 Steering Committee” from February 22nd, 2010.
- International Labor Office, Seed working document no. 25, Handicrafts and Employment in the Provinces of Settat and El Jadida, Program on boosting employment by developing small businesses, Department of Job and Business Creation, Geneva, 2002.
- Kingdom of Morocco, Skills Development and Social Security as Part of an Integrated Strategy for Job Creation, Middle-East and North African region, Social sectors group (MNSHD), World Bank Document.
- United Nations Industrial Development Organization, Handicrafts in Morocco, an Unexploited Source, Development Project for Essaouira Leather Working and Safi Pottery Local Production Systems.
- Kingdom of Morocco, Ministry of National Education, Higher Education, Executive Training and Scientific Research, the National Research Priorities, Programs, Areas, and Themes Defined According to the Government Guidelines for Development, 2009-2012 period, Science branch – July 2009.

- International Labor Office, Study Prior to the Introduction of the “*Cultural and Development Product*” Label, The Chambre des Beaux-Arts de la Méditerranée, September 2002.
- International Labor Organization, Ministry of Employment and Professional Training, *Study to Monitor the Professional Placement of Young Apprentices Trained within the Handicrafts Production Pilot Scheme from 1997-1999*. Evaluation Report, October 2001.
- Kingdom of Morocco, Skills Development and Social Security as Part of the Integrated Strategy for Job Creation, Middle-East and North African region, Social Sectors Group (MNSHD), World Bank Document.

APPENDICES

APPENDIX I: LIST OF AGENCIES & COMPANIES

- ANAPEC- SAFI AGENCY
- SECRETARY OF STATE FOR HANDICRAFTS
- REGIONAL DELEGATION OF HANDICRAFTS
- CHAMBER OF HANDICRAFTS
- CRI - SAFI
- ASSIF POTTERY
- SAFI HANDICRAFTS
- STE POTTERIES CHAKIR
- SERGHINI POTTERY
- SERGHINI HASSAN & NABIL
- HANDICRAFTS COOPERATIVE
- AVENIR D'EXPORTATION POTTERY COOPERATIVE -EIG

Visit to Potter's Hill workshops

Visit to Chaâba Valley workshops

APPENDIX 2: POTTERY-CERAMICS TRAINING PROGRAM

SYNTHÈSE DU PROGRAMME DE FORMATION

Nombre de modules :	24	Poterie - céramique
Durée en heures :	1800	Valeur en unités : 120
Code du programme :	APC	

Code		Titre du module	Durée (heures)	Unités*
APC-01	1.	Métier et formation	30	2
APC-02	2.	Santé et sécurité	30	2
APC-03	3.	Application des notions de calcul et de géométrie à la réalisation d'une pièce céramique	30	2
APC-04	4.	Plâtes d'angle et techniques de préparation	60	4
APC-05	5.	Techniques de façonnage	60	4
APC-06	6.	Tournage	180	12
APC-07	7.	Céramique marocaine	45	3
APC-08	8.	Décor sur pièce crue	45	3
APC-09	9.	Initiation aux techniques de cuisson	45	3
APC-10	10.	Fabrication d'une pièce à un composant	90	6
APC-11	11.	Fabrication d'une pièce à plusieurs composants	120	8
APC-12	12.	Initiation au milieu du travail – stage 1	60	4
APC-13	13.	Dessin	60	4
APC-14	14.	Fabrication d'un moule en plâtre	105	7
APC-15	15.	Moulage	75	5
APC-16	16.	Préparation à la réalisation de décors	60	4
APC-17	17.	Réalisation de décors à l'aide d'enduits céramiques	75	5
APC-18	18.	Production d'une série	150	10
APC-19	19.	Initiation aux opérations de vente	30	2
APC-20	20.	Réalisation d'une collection sur commande	150	10
APC-21	21.	Recherche d'emploi	30	2
APC-22	22.	Intégration au milieu du travail – Stage 2	120	8
APC-G1	G1.	Communication orale et écrite en français	90	6
APC-G2	G2.	Communication orale et écrite en arabe	60	4

* Une unité équivaut à 15 heures

APPENDIX 3: ASSOCIATIONS AND COOPERATIVES – POTTERY INDUSTRY –SAFI

Cooperatives:

Cooperative	Line of business	Place	Number of members	Date of creation
Amal	Pottery	Safi	119	01/01/1953
Alhassania	Pottery	Rural community Saadla	19	15/01/1996
Mobdii Alkhazaf	Pottery	Safi	10	22/05/2003
Avenir d'exportation	Pottery	Safi	18	31/07/2003
COOPERATIVES 4	TOTAL MEMBERS:		166	

Associations:

Association name	Line of business	Place	Number of members	Date of creation
Al Assala	Pottery	Safi	10	03/05/2002
Attadamon	Pottery	Safi	18	28/10/1998
FIS artisans	Pottery	Safi	14	24/05/1999
Moubdii khazaf	Pottery	Safi	8	05/04/1999
Chaâba	Pottery	Safi	23	16/03/2001
Al Ouafi	Pottery	Safi	16	20/03/2002
Nohoud	Pottery	Safi	10	05/04/2005

Wafaa	Pottery	Safi	7	23/04/2004
Nor	Pottery	Safi	7	09/12/2005
ASSOCIATIONS 9	TOTAL MEMBERS:		113	

APPENDIX 4: LIST OF BUSINESSES IN THE SAFI POTTERY INDUSTRY

Company Name	Location
Serghini .A	Route Dar Si Aissa Safi
Assif Poteries, sarl	Potter's Hill Safi
Poteries Chakir, sarl	Route Marrakech Safi
Poteries Tensift, sarl	Potter's Hill Safi
Assala Poteries, sarl	Route Dar Si Aissa Safi
Ziouani Frères, sarl	Potter's Hill Safi
H&N Serghini	Route Marrakech Safi
Ziouani J.	Potter's Hill, Safi
Souilmi H.	Bab Chaâba Safi
Belghalia, O.	Bab Chaâba Safi
Benkaltoum S.	Potter's Hill, Safi
Elam H.	Potter's Hill SAF
Frères Fakhari	Jardin Public Safi
Dmani, A	Potter's Hill Safi
Laghrissi, A	Potter's Hill Safi

APPENDIX 5: ANAPEC: PROGRAM SHEETS



Le premier pas vers l'emploi

Pour gagner en compétitivité, l'entreprise doit enrichir le capital de ses ressources humaines au meilleur coût.

Pour conquérir sa place dans la société marocaine d'aujourd'hui, un jeune diplômé doit développer ses compétences et acquérir une première expérience professionnelle au sein de l'entreprise.

LE CONTRAT D'INSERTION est le cadre où se rencontrent ces deux exigences.

L'OBJECTIF POUR L'EMPLOYEUR

Développer les ressources humaines de l'entreprise et améliorer son encadrement par le recrutement de jeunes diplômés, à insérer sans avoir à supporter des charges salariales importantes.

L'OBJECTIF POUR LE JEUNE DIPLOMÉ

Accroître son employabilité par l'acquisition de compétences professionnelles nouvelles, notamment à travers une première expérience en entreprise.

UNE PROCÉDURE SIMPLE ET RAPIDE

L'entreprise dépose un dossier (un par stagiaire) auprès d'une agence de l'ANAPEC, composé de :

- Une copie légalisée de la CIN du stagiaire;
- Une copie légalisée du diplôme du stagiaire;
- Une déclaration sur l'honneur du stagiaire qui atteste n'avoir jamais bénéficié d'un contrat d'insertion.

Le contrat d'insertion est signé par l'entreprise et le jeune diplômé en 04 exemplaires.

L'ANAPEC étudie la demande ; le contrat prend effet à la date de sa validation.

AVANTAGES OCTROYÉS

Trois modèles de contrats d'insertion sont prévus et donnent lieu à des exonérations encourageantes modulées en fonction du niveau du salaire mensuel :

Modèle I :

- Salaire : entre 1600 et 2400,64 DH ;
- Avantages : exonération des cotisations CNSS/TFP et de l'IR pendant 24 mois, prolongée de 12 mois (si contrat de droit commun) ;
- Population cible : diplômés (de l'enseignement supérieur et de la formation professionnelle) et bacheliers inscrits à l'ANAFEC.

Modèle II :

- Salaire : entre 1600 et 6000 DH ;
- Avantages : exonération des cotisations CNSS/TFP et de l'IR pendant 24 mois, prolongée de 12 mois (si contrat de droit commun) ;
- Population cible : diplômés (de l'enseignement supérieur et de la formation professionnelle) inscrits à l'ANAFEC depuis plus de 6 mois.

Modèle III :

- Salaire : entre 1600 et 6000 DH ;
- Avantages : exonération des cotisations CNSS/TFP pendant 24 mois, prolongée de 12 mois (si contrat de droit commun) ;
- Population cible : diplômés (de l'enseignement supérieur et de la formation professionnelle) et bacheliers inscrits à l'ANAFEC.



Fiche technique du programme Moukawalati

Objectif général du programme

Lutter contre le chômage moyennant l'encouragement à la création des TPE génératrices de richesse et d'emploi.

Objectifs spécifiques du programme

Le Programme MOUKAWALATI a pour objectifs :

- la création effective d'entreprises viables,
- la pérennisation des entreprises créées

Objectif stratégique du programme

La création de 30.000 TPE et 90.000 emplois à l'horizon de 2008.

Etendu du programme :

National

Durée du projet

De 2006 à l'horizon 2008

Descriptif du programme

Le programme Moukawalati vise à encourager la création des entreprises, assurer un accompagnement pré et post création des TPE créées afin de les pérenniser.

Bases juridiques

L'accompagnement prévu dans le cadre du programme MOUKAWALATI s'appuie sur la loi 51/99 instituant la création de l'ANAPEC et le contrat Progrès ETAT/ANAPEC qui prévoit la prise en charge par l'ANAPEC des frais d'accompagnement à hauteur de 10.000,00 DH par projet.

Population éligible

Les personnes éligibles à l'accompagnement pour la création d'entreprises sont les porteurs de projets dont le coût d'investissement est compris entre 50.000 DH et 500.000 DH et remplissant les conditions suivantes :

- de nationalité marocaine,
- âgés entre 20 et 45 ans à la date de dépôt de la demande de crédit,
- titulaires d'un baccalauréat, d'un diplôme de la formation professionnelle, ou de l'enseignement supérieur public ou privé,
- inscrits à l'ANAPEC à travers les guichets Moukawalati,
- et porteurs d'un projet de première création d'entreprise.

Un projet dont le coût d'investissement dépasse 250.000 dhs doit être initié par deux promoteurs.

Tout candidat à la création d'entreprise ne peut bénéficier de l'accompagnement prévu par le programme MOURAWALATI qu'une seule fois. Cet accompagnement est conditionné par sa sélection définitive par la commission créée à cet effet au niveau des CR.

Organismes prestataires éligibles

La validation des candidatures des organismes, désirant ouvrir des guichets d'appui à la création d'entreprises et leur renouvellement sont assurés par le Ministère de l'Emploi et de la Formation Professionnelle :

- suite à une approbation du comité national du programme MOURAWALATI ou
- sur proposition des comités régionaux du programme MOURAWALATI ou de l'ANAPEC.

La liste des organismes habilités à ouvrir des guichets d'appui à la création d'entreprises est arrêtée par décision du Ministère de l'Emploi et de la Formation Professionnelle. Des conventions sont signées par la suite signés entre ces organismes et l'Agence Nationale de Promotion de l'Emploi et des Compétences.

Mesures d'accompagnement du programme Mourawalati

- accompagnement pré et post création des jeunes porteurs de projets dont l'investissement ne dépasse pas 250 000 DH ;
- prise en charge par l'ANAPEC des frais de l'accompagnement à hauteur de 10 000,00 DH par projet ;
- délégation de la gestion de la garantie de 85% du crédit bancaire par la C.C.G aux banques pour le compte de l'Éta ;
- octroi d'une avance sans intérêts représentant au maximum 10% de l'investissement et dans la limite de 15.000,00 DH remboursable sur six (6) ans dont trois (3) de grâce ;

Organes de gestion et de mise en œuvre du programme

- Comité National du programme MOURAWALATI
- Comité Régional du programme MOURAWALATI
- Guichets d'Appui à la Création d'Entreprises
- Agence Nationale de Promotion de l'Emploi et des Compétences

Parcours du porteur de projet

1. Accueil et Inscription du porteur de projet / Guichet
2. Présentation du candidat / Guichet
3. Sélection définitive / CR
4. Accompagnement du porteur de projet / Guichet
5. dépôt à la banque
6. suivi post création / Guichet



Programme TAEHIL

Deux Mesures concrètes pour le programme TAEHIL.

- Formation contractualisée pour l'emploi
- Formation qualifiante ou de reconversion

Formation contractualisée pour l'emploi

Objectif FCE:

La formation contractualisée pour l'emploi a pour objectif de permettre:

- à l'employeur de réaliser des recrutements pour lesquels il a des difficultés à trouver les candidats ayant les compétences requises
- au chercheur d'emploi d'améliorer son employabilité à travers l'acquisition des compétences nécessaires en vue d'occuper un emploi identifié
- à l'opérateur de formation de bien connaître les besoins du Marché de l'Emploi en vue de mieux adapter les programmes et la pédagogie.

Bases juridiques

La formation contractualisée pour l'emploi est régie par :

- ✓ La Loi 51/99 ayant institué la création de l'ANAPEC et
- ✓ Le contrat progrès ANAPEC/ETAT pour la période 2006-2008.

Personnes éligibles

Bénéficient de cette formation, les chercheurs d'emploi inscrits à l'ANAPEC, titulaires d'un baccalauréat au moins ou lauréats de la formation professionnelle et sélectionnés par un employeur dans le cadre d'une action de recrutement.

Employeurs éligibles

Sont éligibles à la formation contractualisée pour l'emploi, les entreprises marocaines ou étrangères (dans le cadre du placement à l'international). Les actions peuvent être montées par un employeur ou un groupement d'employeurs.

On entend par groupement d'employeurs, une association professionnelle locale, régionale ou sectorielle ainsi que tout groupe d'employeurs.



Formation Qualifiante ou de reconversion

Objectifs

Le programme de formation qualifiante ou reconversion s'adresse aux jeunes diplômés en difficulté d'insertion et vise à adapter leur profil aux besoins du marché de l'emploi et faciliter par conséquent leur insertion dans la vie active.

Bases juridiques

Le programme de formation qualifiante ou reconversion est régi par :

- La loi 51/99 ayant institué la création de l'ANAPEC,
- Le contrat progrès ANAPEC/ETAT pour la période 2006-2008 et
- Circulaire conjointe du Ministre de l'Emploi et de la Formation Professionnelle et du Ministre de l'Intérieur pour la mise en place des comités régionaux d'amélioration de l'employabilité

Personnes éligibles

Bénéficient de cette formation, les chercheurs d'emploi inscrits à l'ANAPEC, titulaires d'un baccalauréat au moins ou diplômés de la formation professionnelle, ayant besoin d'une réorientation vers des formations permettant de développer des compétences demandées par les Entreprises.

Opérateurs de formation éligibles

La formation qualifiante ou reconversion peut être assurée par :

- les établissements publics de formation professionnelle ou d'enseignement supérieur ;
- les établissements privés de formation professionnelle, ayant une accréditation de l'autorité gouvernementale chargée de la formation professionnelle ;
- les établissements privés d'enseignement supérieur, ayant une accréditation de l'autorité gouvernementale chargée de l'enseignement supérieur ;
- les établissements privés de formation professionnelle ou d'enseignement supérieur ayant une autorisation, dont les offres ou projets ont été sélectionnés par le comité régional d'amélioration de l'employabilité ;
- les cabinets de conseil en formation