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MOROCCO: PRIVATE SECTOR TRAINING NEEDS ASSESSMENT

FINAL REPORT

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EXECUTIVE SUMMARY

One of key objectives of economic policy reform in Morocco has been to strengthen the role of the private sector in the economy. The Morocco government has carried out major economic reforms, thereby opening the path for private sector growth. In light of these trends, USAID/Morocco plans to reorient its training efforts toward the private sector. The purpose of this study was to lay the groundwork for the design of USAID's future private sector training programs. The study aimed to address three questions:

- What are the training needs of the Moroccan private sector?
- What is the capacity of in-country educational and training institutions to address these training needs?
- How can USAID design its training programs to meet private sector training needs?

A. Private Sector Training Needs

The assessment team interviewed forty businesses in order to gain their perspective on private sector training needs in Morocco. Thirty-one of the firms were interviewed by means of a structured survey questionnaire. The team then interviewed an additional nine firms in order to validate and clarify the data obtained through the survey. The key findings of these interviews are as follows:

- Moroccan firms tend to have a thin layer of employees at the decision-making or "cadre" level. This is particularly true of small firms, where the only cadre may be the director of the firm. This has important ramifications for the design of private sector training programs. Given that firms have few cadres relative to the total number of employees, they usually cannot afford to send cadres for training for long periods of time.
- While the number of cadre-level employees is low in most Moroccan firms, the percentage of female employees at the cadre level is even lower. In one of Morocco's largest and most sophisticated firms, women make up 12% of all cadre-level employees. The greatest opportunities for women cadres appear to be in marketing, finance, import-export, accounting, computer systems, research and development, and quality control -- the service-oriented professions, as opposed to the technical or production-oriented professions.

- A high percentage of firms (84%) stated that their employees have access to training through the firm. The most highly-valued form of training is provided through foreign suppliers; such training is provided as part of the purchase of new equipment or technology.

- Moroccan firms prefer short-term, in-country training for their employees. More than 30% of the firms participating in the survey felt their training needs would increase over the next five years in the following areas:

    - Computer Training
    - Production Technologies
    - Quality Control
    - Inventory Management
    - Energy Efficiency

- In addition, the team believes that training in management, marketing, and human resource management will be increasingly important over time.

- With respect to U.S. short-term training, Moroccan firms are most interested in "internships" in American firms, as opposed to formal training courses.

- Very few Moroccan firms are interested in sponsoring long-term training for their employees; however, they are eager to recruit participants trained in the U.S. at the Masters level. Areas of special interest include biotechnology, international business, telecommunications, finance, and industrial engineering.

- Ninety percent of the firms expressed a willingness to finance training for their employees. In fact, many firms are already paying for training. About 26% of the firms surveyed noted that they spent between 10,000 and 100,000 dirhams on training for their employees last year; an additional 25% spent between 100,000 and 1,000,0000 dirhams. In contrast, 36% of the firms stated that they spent no money on training last year.

- Most firms stated that direct communication with the private sector would be the most effective way to disseminate information on training programs.

B. Private Sector Training Resources

- The Moroccan educational landscape has changed significantly over the past decade. In response to mounting pressure to expand access to higher education while reducing public expenditures, the government passed legislation in 1984 which allowed for the creation of private and "for-profit" post-secondary institutions.

- Since 1985, there has been a virtual boom in private higher education, due in large part to the demand among young Moroccans for higher education which can lead to employment. Over 25 government "authorized" private schools have emerged, providing much-needed access for Moroccans who cannot - or choose not to - attend state institutions. Most offer degrees in management, computers or a combination of both at the "BAC + 3 or BAC + 4" level. To date, virtually all graduates have obtained employment in the private sector.

- Paralleling these developments have been changes in the state-sponsored institutions, partially to respond to demands for more "marketable" education. Some universities have developed continuing education programs and have begun to try to tailor curricula to the needs of the private sector. Among the public institutions, the "Grandes Ecoles" respond most effectively to the needs of the private sector.

- In sum, a variety of strong local training resources exist. Most of these institutions are geared toward training young Moroccans to enter the private sector. However, their programs could also be adapted to meet the needs of the employees of private firms in areas such as management, marketing, computers, international trade, human resource development, business English, and engineering.

C. A USAID Strategy for Private Sector Training

The changes in Morocco's educational and training environment offer a unique opportunity for USAID: an opportunity to strengthen and utilize local resources for training. The top priority for USAID's private sector training programs should be the development of in-country training programs designed to meet the specific needs of the Moroccan private sector. In-country training should be complemented by a limited amount of short and long-term training in the U.S., in areas where Moroccan firms can benefit from U.S. expertise.

The training needs of the Moroccan private sector are very diverse. The team therefore recommends a portfolio of training interventions to build in the flexibility needed to meet private sector training needs. These interventions will serve to meet two goals.

> The primary goal is to foster private sector growth through the development of training programs adapted to the managerial and technical needs of Moroccan businesses.
>
> A secondary goal is to strengthen the capacity of the public sector to create an environment conducive to private sector growth.

The team recommends the following areas for USAID interventions in private sector training. Each of these is described in greater detail in the report.

- On-Going Identification of Private Sector Training Needs
- Short-Term Professional Training for Private Sector Employees
- Strengthening of In-country Training Capacity
- Development of Advanced Technical and Managerial Expertise
- Policy Reform to Create an Environment Conducive to Private Sector Growth

In conclusion, there are three key factors to keep in mind in designing private sector training programs in Morocco. First, the **identification of training needs must be an on-going process.** This study is a first step in assessing private sector training needs. However, what will make USAID's private sector training successful in the future is the development of an on-going process for assessing and responding to private sector training needs.

Secondly, **training programs must be market-driven.** The private sector must be actively engaged in the process of identifying training needs and programs to suit its needs. Lastly, **training mechanisms must be flexible** in order to respond to the changing needs of the private sector. Programs must evolve as training needs evolve. This implies a greater emphasis on short-term training than long-term training, as well as a greater emphasis on in-country training programs.

CHAPTER I

INTRODUCTION

A fundamental objective of economic policy reform in Morocco has been to strengthen the role of the private sector in the economy, while gradually reducing the role of the public sector. During the past decade, the government has carried out major structural reforms, thereby opening the path for private sector growth. In the coming decade, the government will rely more heavily on the private sector to generate new investment and employment in the economy. While no longer carrying the burden for economic growth, the government will continue to play a key role in creating an environment conducive to private sector development and growth.

In light of and in support of these trends, USAID/Morocco is reorienting its portfolio of development programs and projects. The Mission is seeking to promote private sector initiatives and to integrate private sector approaches throughout its portfolio. The Energy Demand Management Project, the proposed Agribusiness Promotion Project and the Health Care Finance Project exemplify the Mission's efforts to integrate private sector approaches in its traditional sectors of involvement.

USAID/Morocco's training activities are no exception. To date, the Sector Support Training Project has aimed to improve the skills of mid and senior-level employees in the Moroccan **public sector**. Most training has involved U.S.-based short-term technical training, U.S.-based long-term training (primarily, at the Master's level), and English-language training. Other than the recently developed Master of Business Administration sub-project, no training has been provided to the private sector. Over the course of the next year, USAID will be designing a new training project. In line with the new directions in USAID's portfolio, a key component of the project will be **private sector** training.

The purpose of this study was to lay the groundwork for the design of the new project. More specifically, the study aimed to address three questions:

- What are the training needs of the Moroccan private sector?
- What is the capacity of in-country educational and training institutions to address these training needs?
- How can USAID design its training programs to meet private sector training needs?

The structure of this report parallels these questions. Chapter II presents the economic context for private sector training and the development of private training institutions. Chapter III examines private sector training needs, presenting the results of the team's survey of Moroccan businesses, as well as its interviews with a number of firms and professional associations. Chapter IV presents an assessment of the capacity of local educational and training institutions to meet private sector training needs. And finally, Chapter V proposes a private sector training strategy for USAID.

It is important to note that this assessment focuses on the training needs of mid to senior-level professional employees in the private sector, or for lack of a better term, the cadres within a firm. At the request of USAID, the team did not examine training needs at the vocational level. This is not to imply that vocational training needs may not be significant; in fact, a number of firms noted that there are very important needs at this level. However, based on USAID's priorities, mid to senior-level managers and technicians were a more appropriate target group for this assessment.

Team Approach

The study was conducted by Ernst & Young in collaboration with Sigma Tech Ingénierie, a Moroccan consulting firm based in Rabat. It was fully funded by USAID/Morocco's Sector-Support Training Project through a buy-in to PRE's Private Enterprise Development Support Project (PEDS). The Ernst & Young/Sigma Tech team was composed of the following individuals:

Sydney Lewis	Ernst & Young Team Leader/Private Sector Analyst
Andrew Gilboy	Ernst & Young Consultant Education and Training Specialist
Abdelhanine Benallou	Sigma Tech Ingénierie Project Chief
Ali Fassi-Fihri	Sigma Tech Ingénierie Private Sector Analyst
Karim Laraki	Sigma Tech Ingénierie Private Sector Analyst

Most of the field work for the assessment was conducted over a two month period from September through October 1990. The approach employed by the Ernst & Young/Sigma Tech team involved five steps. Each of these steps is described below:

1. Preliminary Reconnaissance Mission

The Ernst & Young (E&Y) team leader spent one week in Morocco in late July to launch the training needs assessment. The primary objective of the reconnaissance mission was to select a Moroccan firm to assist in conducting the assessment. E&Y placed an advertisement in the Moroccan press, and through a competitive bidding process, selected Sigma Tech Ingénierie.

A secondary aim of the reconnaissance mission was to obtain USAID's input on the questionnaire to be used during the assessment. The questionnaire was revised in accordance with the Mission's needs, and translated into French. In addition, the team leader obtained USAID's input on the sectors and the types of businesses to be covered by the survey. A copy of the survey questionnaire is provided in Annex 3 to the report.

2. Survey of Moroccan Businesses

Using the structured questionnaire, Sigma Tech conducted a survey of 31 Moroccan firms and analyzed the data collected therein. The survey focused on firms in the following five sectors:

- Agribusiness
- Textiles and Leather
- Electrical-Mechanical Industries
- Construction
- Tourism

These sectors were selected on the basis of the team's assessment of areas where there is likely to be significant growth during the coming decade, as well as the specific interests of USAID.

To select the firms to be surveyed, Sigma Tech compiled a list for each of five sectors, of all of the registered firms located in Casablanca, Rabat, Fes and Meknes. From these lists, Sigma Tech selected a total of 34 firms to be surveyed; only 3 of the 34 firms would not participate in the survey. Selection of the firms within sectors was based on three factors: size, economic activity, and domestic vs. export orientation. The aim was to obtain a variety of firms that would represent the diversity contained within the five sectors targeted by the study.

The low non-participation is perhaps due to the team's approach in contacting the firms. Each of the firms received a letter from USAID, stating the objectives of the survey and requesting their participation. The firms were then contacted by telephone to confirm the time of the interview. The questionnaire was administered in person to a senior manager of the firm, usually the managing director or his/her designee. Each of the survey numerators was formally trained by Sigma Tech in how to administer the questionnaire for the training needs assessment.

Given the small number of firms in the survey, the team does not claim that the survey results are "statistically representative" of the Moroccan private sector; this would require resources far beyond the scope of this assessment. However, we can safely assume that, within each of the sectors and regions covered by the survey, the study covered a representative sample of firms.

3. Validation/Clarification of Survey Findings

The team interviewed another nine firms in order to validate and clarify the data obtained through the survey. These interviews were open-ended and enabled the team to explore in greater depth issues of special interest to the Mission, such as firms' willingness to pay for training and gender issues.

In addition, the team interviewed the directors of seven business and professional associations in Morocco. The purpose of these interviews was three-fold: (i) to obtain the association's views on training needs in their respective sectors; (ii) to assess the internal training needs of the associations; and (iii) to assess the associations' willingness and capacity to serve as a vehicle for promoting or providing training to member firms.

4. Assessment of Private Sector Training Resources

The team conducted meetings with eight of the key educational and training institutions in Morocco. The aim was to assess the capacity of local institutions to address private sector training needs. In preparation for these meetings, the team collected and reviewed the catalogs and brochures of many of the key training institutions in Morocco. In addition, the team reviewed literature on the Moroccan educational and training system. A complete list of the sources reviewed is contained in Annex 2 to this report.

5. Strategy Development

The Ernst & Young/Sigma Tech team jointly developed a strategy for USAID-financed private sector training. The proposed strategy is outlined in the final chapter of this report.

All of the findings and recommendations presented in this report are solely those of the authors. However, we wish to acknowledge the valuable input and contributions of the USAID Mission, in particular, Monique Bidaoui and Joyce Holfeld of the Population and Human Resources Division. We would especially like to thank all of the individuals in the Moroccan government and the business and training communities, who so willingly gave their time and views to the benefit of this assessment.

CHAPTER II

THE ECONOMIC CONTEXT FOR PRIVATE SECTOR TRAINING

The Moroccan economy has experienced profound changes as part of the adjustment and liberalization process. These changes have led to shifts in the types of skills needed within the economy, which in turn, have begun to spark change in Morocco's educational and training institutions.

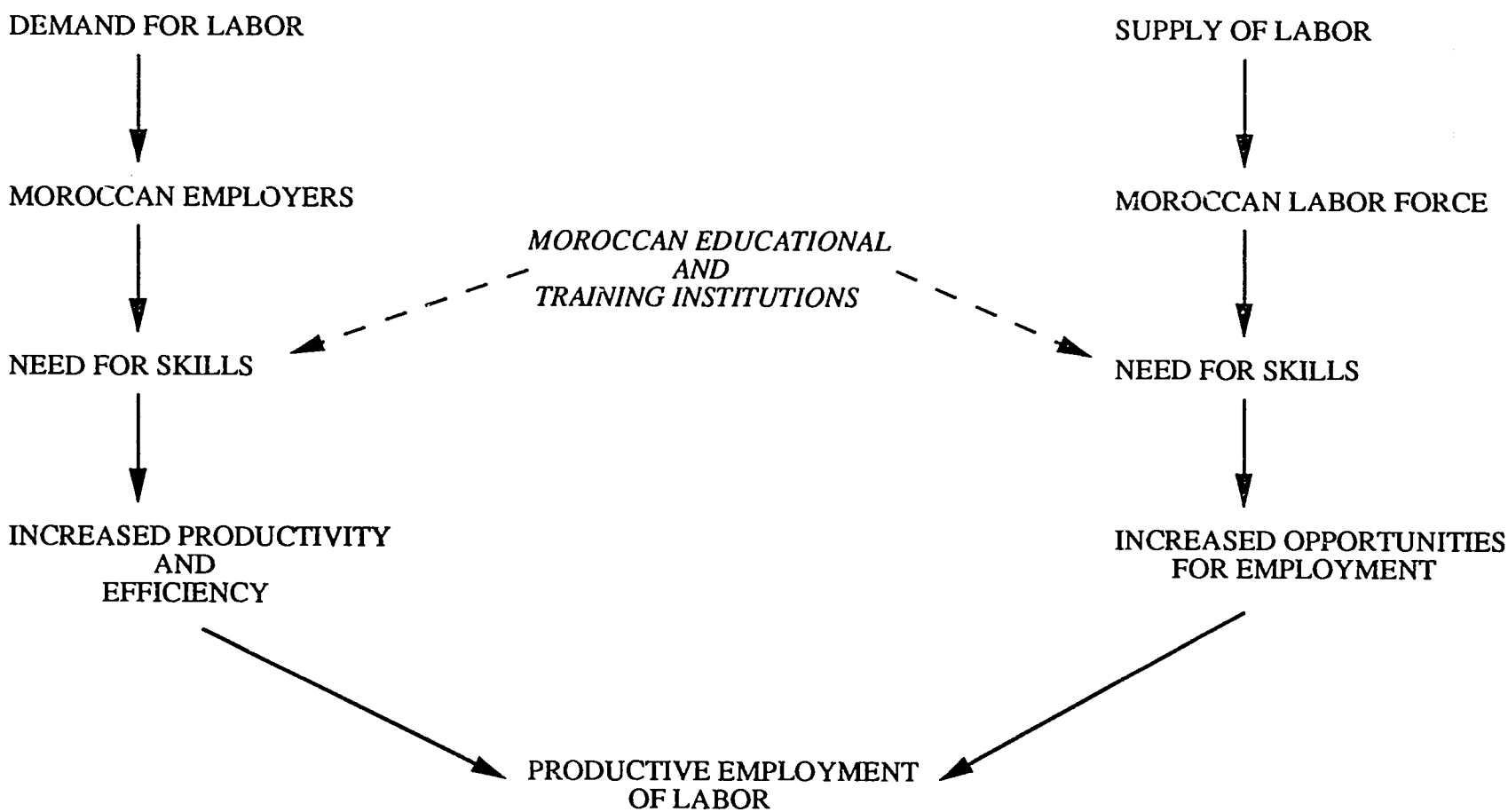
The purpose of this chapter is not to examine the Moroccan economy. The process and the impacts of adjustment and liberalization have been well-documented in other reports, such as the World Bank's Sustained Investment and Growth in the Nineties and The Impact of Liberalization on Trade and Industrial Adjustment. However, because changes in the economic environment are so central to changes in the demand for and supply of labor force skills, it is important to look at some of the key factors which influence this dynamic.

A model for looking at the context for private sector training is presented on the following page. While the model is not specific to Morocco, it illustrates the dynamics between the key elements of this study: the Moroccan private sector, the Moroccan labor force and Moroccan educational and training institutions. On the demand side, Moroccan employers (increasingly, private businesses) need access to a pool of varied skills to ensure the productivity and efficiency of their enterprises. On the supply side, the Moroccan labor force needs to obtain skills that will be marketable to employers and that will increase their opportunities for employment.

More importantly, the model illustrates the central role that educational and training institutions can play in balancing the demand for and the supply of skilled labor -- that is, if they are in tune with the needs of the market and can respond to its needs. When educational and training institutions operate without a market orientation, gaps emerge between the skills employers need and the skills available on the market. This, in turn, contributes to lower productivity and unemployment.

Applying the model to the case of Morocco, there are a number of factors which are changing the dynamics between the demand for labor skills, the supply of labor skills and the educational and training system. Some of the more important factors are discussed below.

THE CONTEXT FOR PRIVATE SECTOR TRAINING



First and foremost, the source of the demand for labor in Morocco has shifted from the public sector to the private sector. While traditionally government played an important role in generating jobs, its role in creating new employment in the future will be minimal. A freeze in the size of the public administration was a key component of structural adjustment in the 1980s.

Privatization will clearly reinforce these employment trends. While public enterprises have long been involved in the productive side of the economy, Morocco's privatization effort is gearing up. Approximately 111 state-owned enterprises are slated for privatization, including four major banks, nine sugar mills, thirty-seven hotels, and a variety of mining and manufacturing enterprises. In addition, a provision of the privatization law will restrict the creation of new public sector enterprises.

The fact that the private sector will be the primary source of new employment and investment in the economy is important from a training perspective. Clearly, it argues for increased investment in training for employees of the private sector, rather than the public sector. But it also argues for a whole new orientation in educational and training programs: an orientation toward the needs of industry and business, as opposed to the needs of government.

Secondly, the environment in which the private sector operates is growing increasingly competitive, and the necessity for access to skills is growing ever more important. Structural adjustment in the 1980s went a long way toward liberalizing trade and reducing price controls. Subsidies on petroleum, butter, milk and cement have been eliminated. Subsidies on inputs to agriculture, such as fertilizer and irrigation water, have been progressively reduced. Import protection tariffs have been reduced. And export taxes and licensing requirements have been virtually eliminated. The net effect of these measures has been to force Moroccan businesses to be more competitive.

Morocco must now prepare itself to tackle the challenge of Europe after 1992. The European Economic Community (EEC) is Morocco's most important trade partner. Over the 1984-1988 period, about 56% of Moroccan exports were purchased by the EEC and about 46% percent of its imports originated in the EEC. The entry of Spain and Portugal in the EEC poses a particular challenge to the Moroccan private sector's ability to remain competitive.

Most analysts agree that the majority of new growth in the Moroccan economy will come from increasing exports, in particular, to Europe, to neighboring countries in North Africa, and to new markets outside of the Mediterranean region. To be competitive, Moroccan firms will need to adopt new technologies, and develop new products and new markets. Some of the key barriers to new market development can addressed through training. For example, language

differences and lack of knowledge of the market are frequently cited as reasons for not entering the U.S. market. These are barriers that can be addressed in part through specialized training programs.

As the economic environment grows more competitive, Moroccan firms will need to be increasingly productive and efficient to survive. This calls for new skills: new skills in management and marketing, and new technical skills. Indeed, shortages of qualified personnel are already emerging in a number of key sectors. In the textile sector, qualified technicians and semi-skilled labor are in great demand; qualified employees are reportedly job-hopping for relatively small increases in salary because they are in such demand. In the construction sector, a number of firms noted that they are unable to keep qualified engineers because of the stiff competition for skilled employees.

The need for access to new sets of skills and technologies has important implications for Morocco's educational and training institutions. Most importantly, it means that institutions must have the flexibility and the capacity to create new programs in response to the diverse and changing needs of the private sector.

On the supply side of the equation, the Moroccan labor force is faced with an increasingly difficult job market. Unemployment remains high. Within the next decade, it is estimated that the labor force will grow by more than 40% or some four million people. Of particular concern is the growing unemployment among university graduates. This is due, in part, to the declining number of jobs in the public sector which were traditionally assumed by university graduates.

While it may seem contradictory, Morocco faces high unemployment <u>and</u> widespread shortages of qualified employees. However, this is evidence that a significant gap does exist between the skills employers need and skills available on the market. Educational and training institutions are not providing graduates with the types of skills needed by the business community; nor are they meeting the needs of their graduates who must find employment in a competitive and demanding market.

But there is change. Faced with the prospect of unemployment, students are seeking out programs that are more oriented to the needs of the market so that they can expand their opportunities for employment. In response to this demand, selected educational and training institutions are developing programs that are geared to the needs of the private sector. Recent changes in Moroccan government policies have encouraged the creation of privately-owned higher education institutions; while relatively young, they appear to have the flexibility and the capacity to respond to the needs of the private sector. The next chapter will explore what those needs are.

CHAPTER III

PRIVATE SECTOR TRAINING NEEDS

A. Profile of the Businesses Interviewed

The Ernst & Young/Sigma Tech team interviewed forty businesses in order to gain their perspective on private sector training needs in Morocco. Thirty-one of the forty firms were interviewed by means of a structured survey questionnaire; a copy of the questionnaire is included in Annex 3. The questionnaire aimed to provide data on the type of training that is needed and desired by Moroccan firms. The team interviewed an additional nine firms in order to validate and clarify the data obtained through the survey. These interviews were open-ended and enabled the team to explore specific training issues in greater depth. The data gathered from these forty Moroccan firms is the foundation for the team's assessment of private sector training needs.

1. Sectoral Representation

As noted in Chapter I, the sectors targeted by the assessment were selected primarily on the basis of their potential for generating growth and employment in the Moroccan private sector.

TABLE 1
SECTORAL DISTRIBUTION OF FIRMS INTERVIEWED

	SURVEY QUESTIONNAIRE	OPEN-ENDED INTERVIEWS	TOTAL
Agri-Business	6	4	10
Textiles/Leather	5	3	8
Electrical-Mechanical Industries	7	0	7
Construction	5	1	6
Tourism	5	0	5
Environmental Businesses	2	0	2
Other	1	1	2
TOTAL	**31**	**9**	**40**

2. Location of the Firms

All of the firms interviewed via the questionnaire were located in either Casablanca or Rabat-Salé. However, to ensure a more balanced geographical distribution, the team conducted face-to-face interviews with six firms in Meknes and Fes.

TABLE 2
LOCATION OF FIRMS INTERVIEWED

	SURVEY QUESTIONNAIRE	OPEN-ENDED INTERVIEWS	TOTAL
Casablanca	21	1	22
Rabat-Salé	10	2	12
Fes	0	4	4
Meknes	0	2	2
TOTAL	**31**	**9**	**40**

3. Size of the Firms

"Size of the firm" was one of the factors taken into account in selecting the forty firms for interviews. Every effort was made to ensure that the sample included a range of sizes -- small, medium and large -- within each of the targeted sectors. The survey questionnaire included two questions regarding the size of the firm, one which requested the chiffre d'affaires of the firm and one which requested information on the number of full-time and part-time employees. It is interesting to note that the question on chiffre d'affaires was the only question which had a high non-response rate; nearly 26% of the firms did not answer this question. In terms of the number of full-time employees, the break-down of the sample was as follows:

TABLE 3
SIZE OF THE FIRMS INTERVIEWED

NUMBER OF FULL-TIME EMPLOYEES	SURVEY QUESTIONNAIRE	OPEN-ENDED INTERVIEWS	TOTAL
15 - 100	11	2	13
100 - 200	9	3	12
200 - 500	5	2	7
500 -	6	2	8
TOTAL	**31**	**9**	**40**

The number of full-time employees is one indication of the size of the firm. However, it is important to note that a number of the firms also had large numbers of seasonal employees, particularly in the agri-business and construction sectors.

4. Domestic vs. Export Orientation

Market orientation was another factor taken into account in the selection of firms. Again, the aim was to obtain a wide range of firms. Of the 31 firms in the formal survey, sixteen of the firms sold all of their goods/services on the local market. Four of the firms were oriented entirely to the export market. The remaining firms sold to both the domestic and the export market in varying degrees. Not surprisingly, Europe was the key market for the export-oriented firms. Only five firms in the sample exported goods or services to North America.

5. Growth Trends

Firms were asked to describe the trends in their sales for the year 1989. Of the 31 firms in the survey, 22 firms reported increased sales in 1989; six firms had increased sales by more than 20%. However, four of the firms had experienced declining sales; interestingly, all of these firms were in the textile and leather sector, where firms face increasingly stiff competition from Asian exporters for the European market.

B. Employee Composition

One of the key findings of the study is Moroccan firms tend to have a very thin layer of employees at the decision-making or cadre level. This is particularly true of small and medium-size firms, where the only cadre may be the director of the firm. This has important ramifications for the design of private sector training programs. Given that firms have few cadres relative to the total number of employees, they usually cannot afford to send cadres for training for long periods of time -- even though such training may be viewed as beneficial to the firm. Cadre-level employees are so essential to maintaining the daily operations of the firm that long-term training is rarely a feasible option. In fact, most firms prefer in-country training to overseas training because it enables cadres to remain in close proximity to the firm, should a problem arise.

1. Gender Considerations

While the number of cadre-level employees is low in most Moroccan firms, the percentage of female employees at the cadre level is even lower. As an indication, women make up 12% of all cadre-level employees in one of Morocco's largest and most sophisticated firms. Relative to many Moroccan firms, this is considered a

fairly high percentage of female participation at the cadre level. The types of positions women occupy is perhaps more indicative than their numbers.

As part of the survey, the team obtained gender-disaggregated data on the companies' employees. Firms provided a break-down of the total number of employees and the number of female employees in the following positions: (i) general director/top management; (ii) senior technical positions such as engineers and economists; (iii) senior administrative positions in personnel, accounting and related divisions; (iv) skilled labor such as electricians and foremen; and (v) semi-skilled and unskilled labor. This data, in addition to information collected during the team's interviews, indicate the following patterns and trends:

- Women are the primary source of labor for a number of key sectors in Morocco, such as textiles and some agri-business and electro-mechanical industries. However, they tend to dominate unskilled and semi-skilled positions within a firm.

- Women rarely hold skilled labor positions. Nearly 80% of the firms in the survey had no women at the "technicien" level. The textile sector is the exception, in that women are often at the head of a production unit or an assembly line.

- At the cadre level, women are more likely to hold senior administrative positions than technical positions. Nearly two-thirds of the firms surveyed had no women in senior technical positions. In contrast, nearly half of the firms stated that the majority of their administrative cadres were women.

- While the percentage of women cadres is still relatively low, it is increasing. According to Moroccan business leaders, this is a reflection of the increasing number of women pursuing higher education.

- The greatest opportunities for women cadres are in marketing, finance, import-export, computer systems, quality control, and research and development. Given the trends in the Moroccan economy, these are areas where the demand for cadres is likely to increase. In addition, based on the team's interviews with company managers, there appear to be fewer barriers to women's participation in the service-oriented professions than in the technical or production-oriented professions.

- Most business leaders believe that it is unrealistic to hold a 30% quota for female participants in private sector training programs. This is particularly true if programs are geared toward existing employees of firms because there are so few female cadres currently employed in Moroccan firms.

These findings are consistent with the results of a recent study on women in business conducted by L.M.S. Conseils, a Casablanca-based consulting firm, and published in Enjeux: Le Magazine de l'Entreprise et de l'Economie in September 1990. One-hundred female cadres in private firms participated in the study. When asked their opinion about what departments women cadres are found most often, 87.8% of the women noted administrative departments; 55.6% stated commercial divisions; 7.8% stated financial sections; and only 1.1% stated technical divisions of the firms. [Note: Multiple responses were possible].

In terms of the types of positions generally held by female cadres, the most common response was secretary or administrative assistant (57.8% of all respondents), followed by "chef de service" (36%) and cadres (23%). In sum, the article concludes that "la femme cadre sait qu'elle n'est pas au premier rang et que son poste, s'il n'est pas vraiment subalterne, est rarement au top" (Enjeux, p. 41).

2. Educational Requirements

Most Moroccan firms place greater value on experience than education. Nonetheless, the results of the survey indicate that firms do have educational requirements for cadre level positions. For senior management and technical positions, nearly half of the firms interviewed required the equivalent of a bachelor's or master's degree; the other half required a doctorate. Criteria are less stringent for administrative cadres; 32% of the firms required secondary-school degree and 42% required a bachelor's or master's degree. This explains, in part, why women are able to secure administrative positions more easily than technical positions.

Most business people have difficulty finding cadres with the right education and experience for their senior management and technical positions. In contrast, well-qualified administrative cadres seem to be more readily available on the market.

3. Employees' Access to Training

A surprisingly high percentage of firms (84%) stated that their employees have access to training through the firm. About 65% of the firms stated that they provide training to administrative and technical cadres, as well as skilled technicians. About 52% of the firms provide training to senior management personnel.

These numbers would appear to indicate that Moroccan firms are already addressing training needs. However, the type of training provided by firms is perhaps more telling than the numbers. The most highly-valued form of private sector training is provided through foreign suppliers. As part of price of purchasing a new piece of equipment from European suppliers, Moroccan firms "buy"

training for their employees. Training is a key part of the "package" for Moroccan firms; in fact, a few firms noted that they decided not to buy from American suppliers because training was not part of the deal. Training from European suppliers is usually conducted within the Moroccan firm; occasionally, technical cadres will travel to Europe for one to two weeks of training with the supplier. All travel expenses are borne by the Moroccan company.

This type of training is valuable in terms of introducing new technologies to Moroccan firms. However, it is also important to recognize that training is basically limited to the installation and the use of a new piece of equipment. Broader issues of company management, organization, and efficiency are rarely addressed through training via foreign suppliers.

Not surprisingly, there are very few Moroccan companies which have well-established in-house training programs. The exception to this rule is a Meknes-based agribusiness firm. All new engineers at the firm pass through a one-year training period, consisting of a mix of classroom instruction and on-the-ground training in the firm. The employee spends about two to four weeks in each of the firm's divisions to learn all facets of the firm's operations. Technician level employees also rotate within the firm during their first year in order to learn how to operate the firm's equipment. This type of in-house training is unique.

In fact, while some large companies have Human Resource Development Specialists, these individuals often tend to be "glorified" personnel officers. Issues of career development, motivation and training are secondary to more operational aspects of the firm such as payroll and benefits. One HRD officer noted that his objective - as set by top management - is to minimize personnel costs, and as such, he reports to the company's financial director. His personal objective, however, is to convince top management to view personnel not just as a line item in the budget, but rather as a <u>resource</u> - a resource which requires investment and which must be managed effectively

The concept of "investing in human capital" is not widespread. While firms recognize the value of training, they believe that training is an obligation of the state. This view is reinforced by the Moroccan government. A tax equal to 1.6% of the salaries of all employees is levied on firms to finance the operations of the OFPPT (<u>Office pour la Formation Professionnelle et de la Promotion du Travail</u>). In effect, the tax is a powerful disincentive for most firms to invest in human resources. They feel they are already paying the government to provide training. Why should they invest additional funds in training?

Another constraint to private sector investment in training is the fear that employees will leave the firm after training and that the firm will never recoup its investment. This is a legitimate

concern, particularly in the textile sector, where due to a severe lack of trained people, employees quickly move from firm to firm to obtain slight increases in salary. There is also a great deal of mobility in the construction sector. Due to rapid growth in the sector, engineers are increasingly leaving firms to start their own businesses. "Instability" in the labor force explains, in part, why businesses often prefer to invest in training for family members.

C. Training Needs

One of the primary objectives of the survey was to determine areas of training needed and desired by the private sector. The thirty-one firms participating in the survey identified areas where they felt their training needs would increase over the next five years. Taken as a whole, their responses were as follows:

More than 30% of Moroccan Firms Expressed an Increased Need for Training

- Computer Training . . . . . 58.0 %
- Production Technologies . . . . 45.2 %
- Quality Control . . . . . 35.5 %
- Accounting . . . . . 35.5 %
- Inventory Management . . . . . 32.3 %
- Energy Efficiency . . . . . 32.3 %

20-30% of Moroccan Firms Expressed an Increased Need for Training

- Product Design . . . . . 25.8 %
- Financial Management . . . . . 25.8 %
- Administrative Management . . . 22.6 %
- Packaging . . . . . 19.4 %
- Human Resource Management . . . 19.4 %
- Business English . . . . . 19.4 %

10-20% of Moroccan Firms Expressed an Increased Need for Training

- Market Studies . . . . . 16.1 %
- Strategic Planning . . . . . 16.1 %
- Marketing Strategies . . . . . 12.9 %

Less than 10% of Moroccan Firms Expressed an Increased Need for Training

- Contract Negotiation Skills . . 9.7 %
- Knowledge of Regulations Governing Foreign Trade . . . . 9.7 %
- Pollution Control . . . . . 9.7 %

This data is important as a starting point for identifying private sector training needs. However, it should not be viewed as a definitive list of priorities for training for several reasons. First and foremost, this data represents "perceptions" of training needs ... but perceptions of training needs may vary considerably from actual training needs. A company may recognize that it has a certain problem, but clearly, may not be able to identify the kind of training that would resolve the problem. Secondly, the survey questionnaire examined general areas for training, and as such, the results mask sector-specific training needs of private sector firms.

Additional interviews with a number of Moroccan firms and industry-specific professional associations shed new light on the assessment of private sector training needs. Four critical areas for training emerged in our discussions that are not reflected in the survey data: (i) management tools; (ii) marketing; (iii) human resource management; and (iv) sector-specific training.

* Management Tools

The fact that computer training far out-ranked any other form of training desired by the private sector is telling. While there is no doubt a real need for computers within many Moroccan companies, computerization is often viewed as "the solution" to a host of problems that firms face, many of them more management-related. Computers will be effective in addressing many management problems in Moroccan firms, but it is important to recognize that there are other management tools that may be at least as effective as computers.

Morocco has a number of excellent technical training institutions; it also has fine business schools. But rarely are managerial and technical components well-integrated into a curriculum. The end result is a graduate with excellent technical skills in a position requiring management expertise which he or she has not acquired. Additional management training will be essential, particularly for engineers and technicians currently employed in the private sector. It will also be important to strengthen management training within standard technical curricula in some of Morocco's key institutions.

* Marketing

The need for training in market analysis and marketing strategies was ranked surprisingly low in the survey. This may be due to the fact that many Moroccan firms still rely on European affiliates to market their goods in overseas markets, whether in Europe or North America. Moroccan firms will increasingly need to look beyond their traditional approaches to marketing. Already certain industrial sectors, such as leather and textiles, are confronted with stiff competition from Asian industries for the European market -- and Moroccan firms are losing their traditional share of

the market. Upcoming changes in the European economic community in 1992 are also bound to challenge Morocco's hold in the European market for a number of key products, including textiles and selected agricultural products. Lastly, liberalization has paved the way for increased competition in Morocco's domestic market. All of these factors point to a future need for training in identifying new markets in which Moroccan products are competitive, as well developing new products to fit the needs of traditional markets.

* Human Resource Management

Only 19% of the firms survey ranked human resource management as an area in which they perceive an increased need for training. However, during follow-up interviews, nearly all firms mentioned that employee motivation, productivity, and quality control are major problems. The low value placed on human resource management training may be due to the fact that firms seem to equate human resource management with personnel administration, an area which is well-managed by most firms and where no training is needed. But there are major training needs beyond personnel administration that involve the more efficient management and investment in a firm's human resources.

* Sector-Specific Training Needs

Agri-Business: Agri-business firms noted specific training needs in five domains: technologies for new product development, business management skills, international marketing, biotechnology, and energy efficiency. The need for agribusiness management and international marketing skills was also highlighted in a recent assessment of the Moroccan agri-business sector conducted by Development Alternatives, Inc. It is also important to recognize, however, that the agri-business sector in Morocco consists of many sub-sectors, each with its own particular training needs.

Textiles/Leather: Textile firms are characterized by a very thin layer of technical and managerial cadres. AMIT, Association Marocaine des Industries Textiles, estimates that there is one engineer for every 150 employees in the textile sector. The lack of trained employees, particularly ingenieurs textiles and techniciens superieurs, is a major concern for the sector as a whole. Trained employees are in such great demand that they frequently change jobs for relatively small increases in salary. At the urging of AMIT, the Ministry of Public Works intends to create a new institution to train engineers and skilled technicians for the textile sector. The most important area for training is quality control, especially in the production of fabrics. Nearly all fabric for Moroccan textile production is currently imported from Europe because of the poor quality of locally-produced fabrics.

Electro-Mechanical Industries: The most critical areas for training are in the following areas: (i) managerial and technical training for the owners of Moroccan foundries, many of which are small enterprises; (ii) mechanical industries, which are sorely in lack of trained engineers; (iii) the application of computers to the production process; and (iv) applied research. Quality control is a major issue for all of the sub-sector within the electro-mechanical sector.

Tourism: The Moroccan government estimates that 7,000 trained employees will be required in the tourism sector, ranging from highly-trained hotel managers to cooks and cleaning staff. The biggest problem for the hotel industry is maintaining standards for quality service.

Construction: The construction industry is currently experiencing such rapid growth that firms have difficulty holding on to their engineers. Engineers often leave after gaining a few years of experience to start their own businesses. The greatest constraint to future growth is the availability of well-trained and experienced engineers.

* Training for Women Cadres

The women managers interviewed by the team felt that women's training needs are no different from those of men. In fact, they felt that it was important not to create special training programs for women. Moroccan women want to be recognized as an integral part of the firm. The thrust of training programs should therefore be to reinforce Moroccan women's integration in the workplace, rather than to treat them as a separate group with "special needs."

The critical issues for the development of women cadres are to: (i) promote access to educational and training opportunities in higher education so that women are competitive in the job market for cadre-level positions; and (ii) design professional training programs for cadres so as to facilitate women's participation. To take one of many examples, the scheduling of training programs is often a key factor which influences women's ability to participate. If professional education programs take place only during the evenings and weekends, women often cannot participate due to familial obligations. Programs scheduled during the regular work hours are more conducive to women's participation.

In sum, the initial priorities for USAID-funded training at the cadre level should be the following areas:

(a) Computer Training
(b) Quality Control
(c) Energy Conservation
(d) Sector-Specific Production Technologies
(e) Marketing
(f) Management Training for Technicians
(g) Human Resource Management

USAID may wish to initiate its private sector training programs in the areas in which businesses stated they have the greatest needs, specifically (a)-(d). This would provide the impetus for businesses to invest in human resources. Courses in marketing, management and human resource management could follow, once businesses have been convinced of the positive benefits of training for their employees.

While this is an initial listing of priorities, it is important to remember that private sector training needs will evolve. If USAID's programs are to be successful, they too must evolve in response to changing needs of the market. This has important implications for the design of USAID's training programs.

1. Most importantly, the identification of training needs must be an on-going process. This assessment is a first step in assessing private sector training needs. However, what will make USAID's private sector training successful in the future is the development of a on-going process for assessing and responding to private sector training needs.

2. Training programs must be market-driven. The private sector must be actively engaged in the process of identifying training needs and programs to suit its needs. Conversely, USAID must actively market its training programs to the private sector.

3. Training mechanisms must be sufficiently flexible to respond to the changing needs of the private sector. Programs must evolve as training needs evolve. This implies a greater emphasis on short-term training than long-term training, as well as a greater emphasis on in-country training programs.

D. Modalities of Training

1. Duration

Moroccan firms stated a strong preference for short-term training for their employees. As noted previously, there are very few firms that can afford to be without a cadre-level employee for long periods of time. Almost 42% of the firms in the survey noted that

they would allow a cadre to be away from the firm for training for up to one week; 29% of the firms stated that the cadre could be away for up to one month; and only 7% stated that a cadre could be away for up to six months.

The one-month limitation seems to hold for another key factor: firms' willingness to pay the salary of the employee during training. Nearly 50% of the firms noted that they would continue to pay the salary of a cadre that attends training for more than one month; 40% noted that they would not be willing to pay the employee's salary.

An even stronger statement in favor of short-term training is firm's unwillingness to guarantee the employee a job after six months of training. Nearly 80% of all firms in the survey stated that they would be unwilling to guarantee the employee a job, if s/he attended a six-month training program. Only 16% stated they would be willing to guarantee employment after training.

2. Location

Moroccan firms also stated a clear preference for in-country training, in part, because it involves less time away from the firm. But another factor which is important for many Moroccan business-people is the extent to which overseas training can be applied to the Moroccan business environment. Many of the business managers interviewed believe that it is difficult to apply what is learned in an overseas setting, particularly in the United States, to the Moroccan firm.

3. The Exceptions

Internships in an American firm, along the lines of the Entrepreneurs International Program, is the one type of short-term, U.S.-based training that Moroccan businesses do want. None of the firms interviewed had heard of the program, yet all expressed a great interest in participating. Firms noted that they would allow a cadre to spend from one to three months in the U.S. for this type of training.

Only one firm expressed an interest in sending its employees for long-term degree training in the U.S. Financing or supporting long-term training is usually not feasible for most Moroccan firms, unless the investment is in a family member who is being "groomed" to take over the business. Nonetheless, an American graduate degree is valued by Moroccan firms, and many large and well-structured firms want to recruit U.S. trained participants. Areas of particular interest include biotechnology, international business, telecommunications, finance, and industrial engineering.

E. Financing Training Programs

Ninety percent of the firms surveyed expressed a willingness to finance training for their employees. In fact, many firms are already paying for training for their employees. About 26% of the firms surveyed noted that they spent between 10,000 and 100,000 dirhams (roughly $1,250 and $12,500) on training for their employees last year; an additional 25% spent between 100,000 and 1,000,000 dirhams on training.

In contrast, 36% of the firms stated that they did not spend any money on training last year. Of the eleven firms that spent no money, eight had 100 employees or less. The amount firms spent on training per employee ranged from 0 to 5,000 dh. The average expenditure per employee was slightly more than 500 dh (this calculation includes the eleven firms that spent no money on training).

While firms may be willing to pay, the "tricky question" is how much. Ultimately, the cost of training must be tested on the market. But to get a sense of firms' willingness to finance training, we asked how much they would be willing to pay for a three-day seminar for one of their cadre-level employees. Almost 65% of the firms stated that they would be willing to pay between 1,000 and 3,000 dirhams (roughly between $125 and $375) or the "going rate" for training seminars in Morocco. However, nearly 20% of all firms said that they would willing to pay less than 1,000 dirhams.

Most firms seem willing to contribute to the cost of training for short-term overseas training. For programs such as Entrepreneurs International, firms stated that they would be willing to pay the airfare and salary of the participant. An additional contribution might be the cost of English-language training before the participant travels to the U.S.

F. Marketing Training Programs

Only 10% of the business-persons interviewed had heard of USAID's training programs; they had heard of the programs through previous work experience in the Moroccan government. It is no surprise that businesses that are unfamiliar with the Mission's programs because, to date, USAID's program has been directed to government employees. Nonetheless, this lack of knowledge does mean that USAID must actively market and disseminate information on its training programs to the private sector. The question is how.

Most firms stated that direct communication -- either in person or by mail -- is the most effective way to market training programs to the private sector. Private sector firms ranked mechanisms for communicating private sector programs in the following order:

TABLE 4
MARKETING MECHANISMS
(ranked in order of perceived value)

- Direct Communication By Mail 61%
- Communication via the CGEM 29%
- Communication via the press 29%
- Communication via professional associations 26%
- Communication via the Chamber of Commerce 16%
- Communication via the Moroccan government 13%

Note: Multiple responses possible

It is interesting to note that professional/business associations were ranked considerably lower than one might anticipate. This is particularly interesting in light of the fact that 87% of the firms surveyed belong to at least one professional or business association. The most common associations among the firms surveyed were the CGEM and the Chamber of Commerce; nine firms stated that they belonged to either the CGEM and/or the Chamber of Commerce. In addition to these two groups, the firms listed an additional 21 associations of which they are members.

There is no single interlocutor for the Moroccan private sector. The multitude of professional and business associations serving different interest groups makes it impossible to consider any one group an effective marketing mechanism for USAID's future training programs. Nonetheless, professional associations often provide a forum for the discussion of sector-specific training needs, and several associations have been very active in addressing the training needs of their constituents. To summarize some of the key activities:

- AMIT, the Association of Moroccan Textile Industries, actively promotes training. Lack of qualified employees is a critical problem among its members, hence AMIT has created a special "working group" to examine training issues. AMIT intervenes at four levels: (a) the selection of candidates for training; (b) the measurement of job aptitudes; (c) the development of industry-specific training institutes and programs; and (d) job placement for graduates.

- ASP, the Association of Sugar Producers, notes that it is the only professional association in Morocco that has created its own training institute. L'Institut Sucrier d'Etudes de Recherche et de Formation (ISERF) was created 11 years ago. Its training programs have evolved from mid-level technical training to the development of a full series of management and technical courses geared toward cadre-level employees. The training courses that are in greatest demand are human resource development, computer training, agronomy, sugar technology, organizational development and maintenance.

- FIMME, the Federation of Electrical, Mechanical, and Metallurgical Industries recently created a working group to examine training needs in the sector. The dynamic director of this working group is likely to generate considerable interest in sector-specific training programs.

The team also examined the potential for providing training to strengthen the capacity of professional associations to serve the needs of their constituents. There appear to be relatively few opportunities for providing training. Most associations are staffed by a director (who is generally the PDG of an important company in the sector), perhaps an assistant, and one or two secretaries. In sum, there are virtually no people to train. Furthermore, lack of knowledge/skills is rarely the factor which constrains associations' capacity to serve members. A more significant factor is the lack of funds, which impedes associations' ability to hire additional staff and to undertake more activities.

Because of their interest and involvement in promoting training, the professional associations should be viewed as one of several marketing vehicles available to USAID. The data clearly shows, however, that there is no substitute for direct dialogue and communication with the private sector.

CHAPTER IV

PRIVATE SECTOR TRAINING RESOURCES

This chapter defines the context for in-country training resources and identifies the principal institutions through which private sector training can be provided. It should be noted that this chapter examines **only** post-secondary higher education, in accordance with USAID's focus on training cadre-level employees. The expansion of private primary and secondary institutions, and the continuing controversy over language of instruction in Arabic or French, are not treated in this report.

A. An Overview of Moroccan Higher Education

Chart A following this section illustrates the organizational structure of Moroccan post-secondary higher education; Chart B indicates the distribution of students within that structure. As the charts indicate, the Moroccan system allows for both public and private institutions of higher education.

1. Public Sector Institutions

The public system includes 39 "colleges" (facultés) and 4 relatively autonomous specialized institutions (engineering and medical) spread over 6 campuses. For the academic year 1987-88, it had 5,440 permanent and 592 part-time professors, and 190,383 students. Specialized higher educational institutes exist under the control of various technical ministries, such as the Ministry of Agriculture and the Ministry of Commerce and Industry.

One way to view Morocco's public sector institutions is in terms of their orientation toward either **university** or **professional** programs. Professional programs include Morocco's "Grandes Ecoles," as well as a number of other technical post-secondary educational programs. In fitting the definitions of the public programs into an American educational context, it is important to understand that there is little formal difference between the university and professional programs; each provides the student with a "college" education. The difference between the categories lies within the substance of their programs, as outlined below.

a. Universities

Universities in Morocco are the closest equivalent to American liberal arts colleges. Fields of study include science and the humanities, economics and philosophy - the classic university portfolio. While the university system has 87% of the student enrollment, many never complete their studies.

In general, universities do not prepare students for employment in the private sector. In fact, overall, the students who graduate from universities have the lowest percentage of employment success in either the public or the private sector.

b. Professional Programs

(i) Grandes Ecoles

The Grandes Ecoles are specialized institutions; highly selective entrance exams are required, often followed by two years of special preparation ("cours preparatoires"). Fields of study are technical and career-specific; they include engineering, management and commerce, agriculture, statistics, applied economics and public administration.

Since 1980 the number of students enrolled in the Grandes Ecoles has grown by 50%. Nonetheless, because university enrollment has continued to swell, Grandes Ecoles account for only 5% of Morocco's post-secondary student enrollment. Close to 100% of these students find employment upon graduation. Most graduates are absorbed into the private sector or the semi-public industrial sector.

(ii) Other Professional Institutions

Like the Grandes Ecoles, the other public professional training programs available in Morocco are technically specific. These include medicine, dentistry and pharmaceutical programs, as well as educational training. They differ from Grandes Ecoles in that they do not require entrance exams for admittance. Six percent of Morocco's students enrolled in post-secondary education programs attend these other professional institutions.

2. Private Institutions

Private schools were first created in 1984, following the passage of legislation authorizing their organization. At present, newly created private colleges officially number 25 but appear to exceed that total. Areas of study include management, commerce and computers. With approximately 3,000 students, they account for only 1 - 2 percent of the total higher education enrollment.

CHART A

HIGHER EDUCATION IN MOROCCO

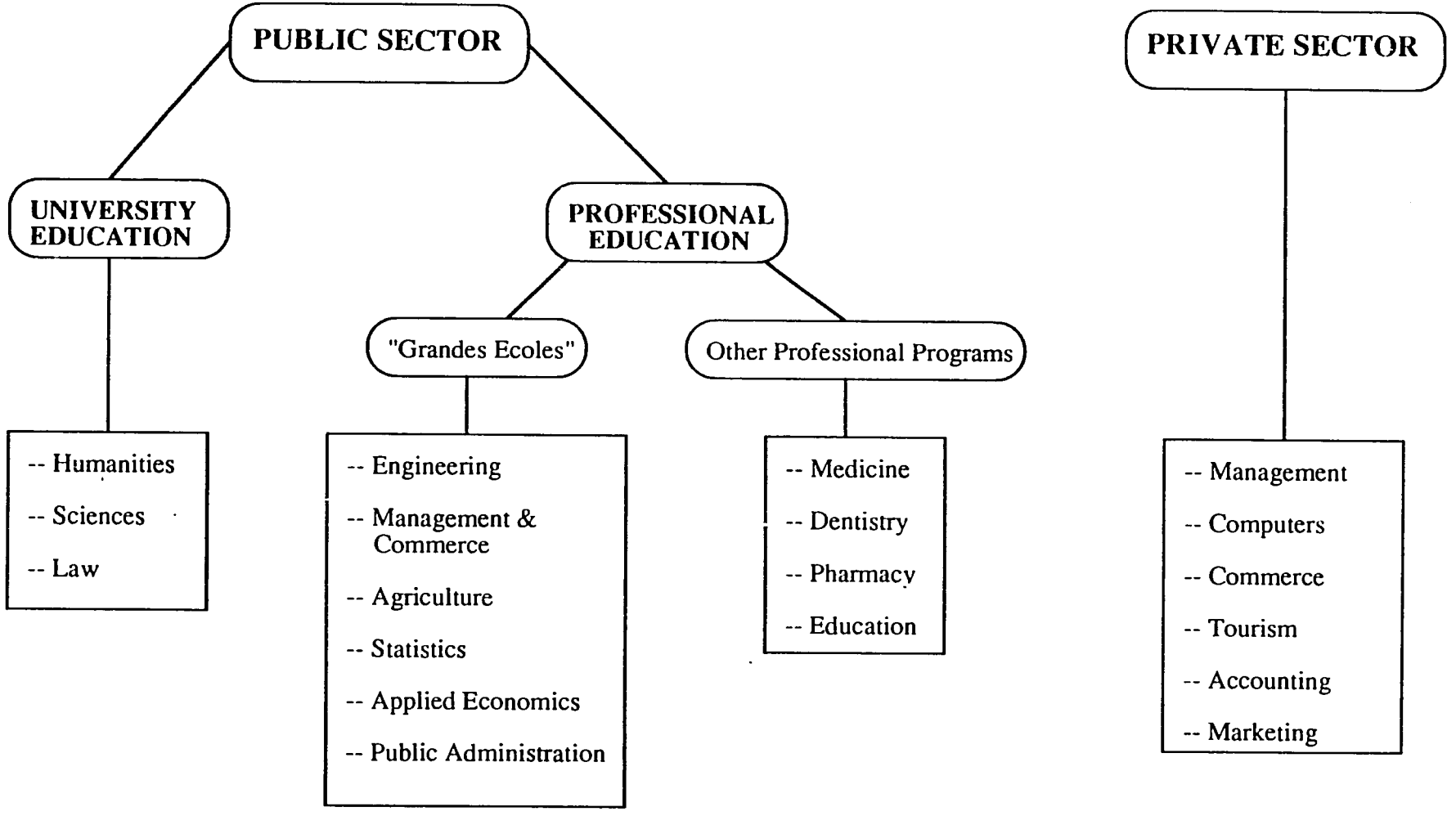
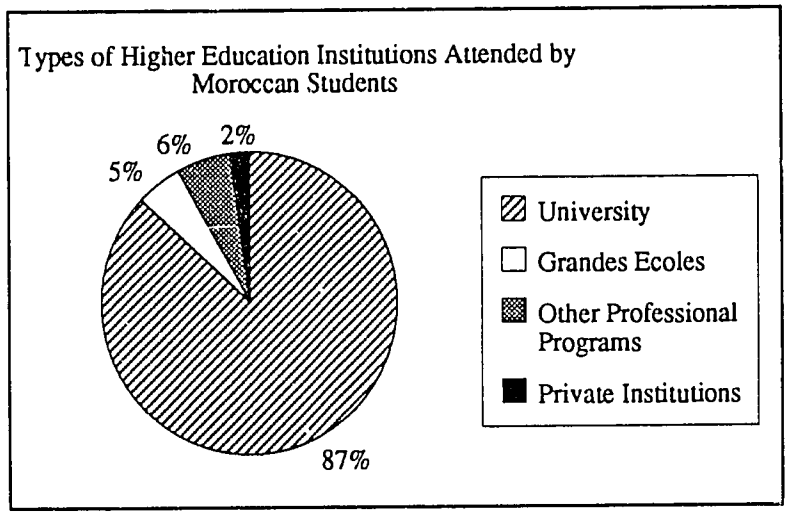


CHART B

ENROLLMENT IN MOROCCO'S HIGHER EDUCATION SYSTEM [Academic Year 1990-1991][1]

UNIVERSITY EDUCATION	No. of Students	Percent
Letters and Humanities	66,681	
Sciences	59,658	
Law	36,726	
Sub-Total	163,065	87%
PROFESSIONAL HIGHER EDUCATION		
Grandes Ecoles	9,799	
Other Professional Programs:		
Medicine, Dentistry and Pharmacy	7,800	
Education (Academic Year 89-90)	4,065	
Sub-Total	21,664	11%
PRIVATE HIGHER EDUCATION		
16 Institutions on Government List	2,200 (Est.)	
Others functioning, some officially	800 (Est.)	
Sub-Total	3,000	2%
TOTAL	**187,729**	**100%**



[1]Direction de la Formation des Cadres

B. Trends in Higher Education

The Moroccan educational landscape has changed dramatically over the past decade. Morocco's educational system, albeit relatively well-developed, was ill-prepared for the global shocks of structural adjustment, skyrocketing costs, and burgeoning demand for education. Khalid El Ouazzani, a Moroccan researcher interviewed for this study, views the historical trends in Moroccan higher education in the following manner:[2]

Independence - 1970:

-- Expansion of post-secondary education
-- Development of the "Grandes-Ecoles" (engineering, agriculture, management)
-- Production of graduates for government service
-- Predominance of graduates in Law

1970 - 1980:

-- Geographic dispersion of educational institutions
-- Continued employment of most graduates in public sector
-- Continued Moroccanization of professor corps
-- Continued predominance of graduates in Law

1980 - 1990:

-- Financial crisis hits the Moroccan economy
-- Declining supply of pubic sector jobs
-- Rising unemployment among university graduates
-- Mounting pressure for places in state institutions
-- Completion of Moroccanization of most institutions
-- Emergence of private post-secondary institutions
-- Change in student preferences from Law to "Lettres"

1990 - 2000:

-- Continued university failure to cope with demands
-- Declining quality of education overall
-- Rising employment among university graduates
-- Expansion of private post-secondary institutions
-- Improved correlation between education and employment
-- Switch in student preference to the Sciences

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[2]El Ouazzani, Khalid, Une Analyse Socio-Economique de l'Enseignement Superieure, Faculte des Sciences Juridiques, Economiques et Sociales de Casablanca, Universite Hassan II, Juillet 1990.

As noted above, Moroccan authorities passed legislation in 1984 authorizing the establishment of private post-secondary institutions (écoles supérieures privées). The pressure for this change reportedly came from growing demand for management and computer courses to feed the private sector demand for graduates with these skills. Moroccans who saw themselves shut out of the public system wanted to be able to earn a degree in management, commerce, and computers in Morocco with European equivalency. The 1984 legislation opened the rigid educational environment to the winds of change.

Private post-secondary institutions emerged almost overnight, initially in Casablanca and Rabat but soon afterward spreading to other major cities. Once authorized by the Ministry of Education, the schools had no further government monitoring, except for building-code and safety inspections. Two of the oldest institutions, L'Ecole Supérieure de Gestion (ESG-Maroc) and the Institut des Hautes Etudes Economiques et Sociales (IHEES) were established in 1985 and achieved rapid recognition due to their links to sister institutions in Paris and Brussels, respectively.

Paralleling the crisis in higher education was the general liberalization of the Moroccan economic environment. The economic rebound which touched key sectors fueled the demand for graduates with marketable skills. Recognizing the size of the demand, and the unlikelihood of sufficient public sector response, Moroccan entrepreneurs were encouraged to develop additional private educational capacity geared toward the needs of the expanding private sector. Within a few years over 25 institutions of varying degrees of quality have sprung up offering programs of study leading to a "Bac + 4" degree, which is the rough equivalent of a BA or BS degree at an American commercial college. New private commercial schools continue to be created each year.

When demographic projections are taken into account, Moroccan higher education is not destined for any easy solutions. Higher education enrollment as a percentage of all public education enrollment is only 5 percent, indicating a relatively narrow upward opening for most Moroccans. As is the case in most developing countries, the impressive gains in education from independence to today are insufficient to meet either the absolute demands of a growing population or the evolving needs of a private sector increasingly dependent on technology and export markets.

It is fair to state that until this decade, public education fulfilled its role in preparing graduates with the qualifications needed. Graduates holding generalist degrees joined the civil service, and graduates with more technical training replaced expatriate technical cadres in public and quasi-public industries. Since approximately 1980, however, public education has not adapted itself to fundamental changes in the make-up of the marketplace by modifying its curriculum and approach to higher education.

GROWTH IN ENROLLMENT IN MOROCCAN PUBLIC EDUCATION

	1956	1989	% Growth
PRIMARY SCHOOL	317,585	2,085,105	6.6
SECONDARY SCHOOL	31,367	1,336,999	42.6
HIGHER EDUCATION	1,867	206,585	110.7

(Source: El Ouazzani, op. cit.)

As a result, today Morocco is faced with the unpleasant reality of a student population resisting weaning itself from the aura of being a university student (with stipend!) to face the job market head on. Whether for lack of options due to the selectivity imposed by the Grandes Ecoles, or to the lack of belief in the future, the mass of students in large measure appear to be making educational choices without regard to the job market.

If over the next decade even a small percentage of the 87% enrolled in generalist studies in the universities knock on the doors of private post-secondary institutions, the demand will quickly exceed the current supply, or out-pace the speed with which entrepreneurs can create new schools or expand capacity.

It should be noted that in the scramble to meet the growing demand for training leading to employment, some sectors of the public system have responded with relative speed and effectiveness. However, all of them are Grandes Ecoles, which by virtue of their selectivity make up a small percentage of the total graduates hitting the market each year.

C. Description of Training Institutions

As the previous section described, private institutions offering "Bac + 3 or 4" degrees make up a small fraction of the total number of places in Morocco's post-secondary field. Furthermore, the public institutions actively adjusting their curricula to meet the needs of private sector employers represent only 10% of the output.

These facts present USAID with an opportunity to encourage both the private and public educational institutions to increase their outputs of graduates with skills needed by the business sector. In order to design creative interventions which do not impede market-driven expansion of private training, USAID should be thoroughly familiar with the sector as it evolves.

The description below is by no means comprehensive, but does outline the training currently available, its duration and cost. It focuses primarily on both private institutions and the Grandes Ecoles, as they are the institutions that are currently responding to the private sector's labor skills needs. A brief overview of vocational institutions is included at the end. A more analytical survey of training institutions would be a useful addition to the limited information available on these young institutions.

1. Private Institutions

Despite the many differences among the private institutions offering post-secondary training in terms of quality of instruction, adequacy of facilities, student services, etc., all focus on training in the following areas:

Business Management	Marketing
International Trade/Economics	Computer Science
Accounting	Financial Management
Communications	Commercial English
Human Resources Development	Hotel Management/Tourism

Not all institutions cover all subjects; hotel management, for example, is found at only a few institutions. There are a few that offer additional subjects, such as electrical engineering and secretarial training. Generalizations applicable to most schools are:

Staffing and Facilities

- Most have only a few permanent professors.
- All use part-time professors, many of whom teach at public institutions and or run their own businesses.
- A few have impressive facilities; most operate out of rented office buildings.

Requirements for Admission and Degrees Offered

- All require at least the Bac or "Niveau de Bac."
- Most have age limits of between 21 and 25 years.
- For entry, many require an exam and often an interview.
- Some accept more advanced students (Bac + 2) upon review of credentials.
- Many offer the "BTS" degree (Bac + 2, Brêvet de Technicien Supérieur degree) after two years.
- Some have established arrangements for continued study abroad.
- All require internships in the private sector.

Program of Study and Language of Instruction

- All use French as the language of instruction.
- All include English in the curriculum.
- Some offer courses taught in English or Arabic as well.
- All offer computer training.
- All operate day-time classes for regular students.
- A few run continuing education courses (evening or week-ends).
- Some arrange specialized, non-degree training for employees of private companies, government departments, banks and insurance companies.

Student Services and Financial Aid

- Some provide career counseling and placement assistance for graduates.
- Some provide tuition-loan arrangements with a local bank.

Advertising and Marketing

- All have brochures, booklets, course programs, etc.
- Some make extensive use of TV, radio and newspaper advertising.

Nearly 95 percent of these private colleges concentrate on management and computers. Approximately 60 percent are located in Casablanca, 20 percent in Rabat and the remainder in Fes, Meknes, Marrekesh and Tangiers.

There were two legal developments which, when added to the surging demand for management-related education, stimulated the creation of new schools. First, in 1984 the Ministry of National Education authorized the creation of private institutions. Its role is limited to verifying that the institution has the required professors with appropriate backgrounds, and that the course material leads to the degrees proposed. Subsequent to receiving this authorization, oversight is passed on to the Ministry of Public Works, which assures the safety and cleanliness of the establishment. There are reported to be disagreements between Ministries as to the type of government oversight needed to monitor private institutions. At this point, there is no formal quality control or accreditation of private post-secondary schools.

The government created additional incentives. Private schools were exonerated from paying a host of taxes, including the "TVA", import duties, licensing and registration fees, and corporate income tax for a certain number of years. Furthermore, repatriation rights were granted to foreign investors of any profits from the operation of the institutions.

In this environment of fiscal and legislative freedom, partnerships were born and ideas put to the test. As with capital ventures elsewhere (for example, computer software in the United States, cable television, etc.) there is likely to be a period of expansion followed by mergers and some bankruptcies. Over time, the market will filter out "the wheat from the chaff," leaving a range of institutions which are able to meet the needs of the market.

A peculiarity of the Moroccan fiscal context, according to the Belgian Director of IHEES, l'Institut des Hautes Etudes Economiques et Sociales, is that there is no statute for a "non-profit, private educational institution." In the case of the IHEES, for example, the Belgian school is part of a non-profit foundation, which resembles the special status accorded private universities in the United States. However in Morocco the IHEES had to be organized as a private company, even though taxes on profits are waived for a determined period. This situation may prove cumbersome in the future for foreign investors looking to establish or expand private post-secondary institutions in Morocco or for local entrepreneurs.

Some Moroccans interviewed expressed discomfort with business people making a profit educating their children. Education is seen as a principal obligation of the state to its people. Moreover, in francophone countries, admission to a university is often accompanied by a monthly stipend or bourse, thereby adding funds to a family's income. The "bourse mentalité" found throughout francophone Africa, whereby students seek the stipend as much as the education, makes paying for an education even more unusual. In the highly charged bourse atmosphere where governments have fallen on a mere announcement that student stipends would be reduced, it is remarkable that so many Moroccans choose to pay for their children's higher education.

The impression that profiteering is taking place at the expense of young people was heard, especially from senior-level officers in public institutions. The lack of government monitoring of the schools was cited as reason for caution. The irony, of course, is that even with a pervasive government hand throughout the entire university system, quality has deteriorated, resulting in the high demand for private education. The gulf between public education specialists and private entrepreneur/educators parallels the mistrust between civil servants and business people. Neither accepts that both contribute importantly to economic and social development, and each has its appropriate operational terrain. The issue of whether profit and quality education mix masks the underlying distrust the public sector has of the private sector.

The business sector can vote, however, through its recruiting practices, and does so vociferously. Students in higher education at state universities are not sought after by private enterprise in Morocco because they are seen as ill-equipped for the job market. Virtually all students attending the Grandes Ecoles and

the private post-secondary institutions find employment shortly after graduation.

While it was not possible to obtain statistics concerning the investment return associated with starting up a private school, it is not difficult to conclude that profits are not pouring in. The start-up costs for the institutions visited, which were the best-known (not necessarily the largest, however), were heavy, with full utilization of the facilities only gradually achieved. The Institut des Hautes Etudes de Management (H.E.M.), for example, opened its doors in 1987 with a brand-new, handsome campus and 65 students! Profits are nowhere to be found in such an enterprise for a number of years. By 1990 H.E.M. was admitting its third class of approximately 70 students, for a total enrollment of only a few hundred. Their optimum size will be 1,000, attainable in a few years. Perhaps at that point will a return on investment be realized.

Institutions linked to European groups, or, like H.E.M., financed by a local bank or company, are investments based on long-term yield potential. The ESG-Paris has spent considerable amounts of money studying the human capital needs of the private sector (Enquete: Besoins des Entreprises et Profils des Diplomés, Résultats Préliminaires) and identifying the characteristics of their student body (or, in other words, their customers). They are no doubt aware of the demographics of Morocco and the substantial potential demand for private education over the next 20 years. The IHEES Director stated that they might be able to run in the black after six years of operation.

Although data is inaccessible, the operating costs for these schools probably mirror experiences in other countries. The review Enjeux[3] broke down expenses as follows:

♦ personnel	40 - 60%
♦ facilities and utilities	15 - 30%
♦ advertising & public relations	5 - 15%

The variation among institutions is probably large, depending on the quality of part-time teachers, the amount spent on facilities and equipment, and the long-term objective of the investors. There are reputed to be some Moroccan investors who have created institutions for tax reasons or to complement or support related business activities, such as real estate (the landlord may be an investor in the school) or transportation (selling bus tickets to students). Ultimately the consumer, with better information, will choose educational institutions offering quality instruction for the price. Slowly the better institutions, as well as the competent

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[3]El Ouazzani, Khalid, "Tremplin ou Toboggan?", Enjeux, October, 1988, p. 36.

ones priced reasonably, will become more selective in their admissions policies, thereby forging more distinct reputations.

From the viewpoint of the private sector user, the reputations of the best schools will spread quickly. The fact that most graduates find jobs quickly is insufficient evidence that needs are being met through training. Which institutions, for example, produce the graduates sought most by businesses? Have those distinctions begun to be formulated by business owners or their personnel/recruitment directors? Where are the relative strengths among the schools between, for instance, business management, accounting, computers, or marketing?

A key factor in the rate of future growth of private higher education will be the disposable income Moroccan families are willing to devote to education. Many Moroccans believe the tuition charged is "high", although it is not known to what extent their impression is based on a perception that education should rightly be free, or on their views toward mixing profit and learning. The tuitions range from around 11,000 DH per year to 22,000 ($1,375 to $2,750), the Academic Year varying from 9 to 11 months. There is no data on the breakdown of the family earnings of students attending private institutions. However, most interviewed believed that only the top layer of Moroccan society could afford to send their children to private schools.

The director at one institution confirmed this view, but stated that of his student population, roughly 30 percent come from "middle-class" families. He said it was fairly common with this group, where the father might be a taxi driver, to get relatives to chip in for the tuition. Several officials told of waiving tuition for perhaps 10 percent of the students in hardship cases. The bank loan program, whereby students borrow a portion (usually half) of their tuition, is used by many students. The H.E.M reported that its first intake of students contained a greater number of students from wealthy families than this year's. About 25 of this year's class of 77 new students took advantage of the bank loan of 10,000 DH ($1,250). The terms of the loan are such that it is to be repaid before the one-year anniversary of their graduation. At H.E.M., to reward academic excellence, the top five students have to repay only half of their loan.

With little hard data, it is premature to draw conclusions about the social strata from where the students at private institutions come. Private schools have flourished in other developing countries with a lower per capita income than Morocco (Kenya, Ivory Coast, Senegal). This is an area where USAID will need better information in order to design interventions which, <u>inter-alia</u>, could serve to expand educational opportunities for disadvantaged segments of Moroccan society. Were such an inquiry conducted, it would be helpful to explore whether university stipends were distributed according to financial need as well.

2. Public Institutions

The public institutions that respond most effectively to the needs of the private sector are the Grandes Ecoles. Although they only represent 5.4% of the total higher education enrollment, these highly regarded institutes produce 11% of the graduates. Moreover, as we have seen, more of these graduates are employed than from the university sector. Certain public institutions therefore contribute significantly to fulfilling the demand for qualified technicians expressed by the private sector.

The table below illustrates the striking disparity between percent of graduates by type of public institution. Although this report does not analyze the costs of higher education as a function of "product completion", one wonders, as does Mr. El Ouazzani in his study, how to justify the drain on public funds given the feeble return. It is also fascinating to note the drop-out rate and its effect on the yield:

THE OVERALL EFFICIENCY OF HIGHER EDUCATION[4]

	Universities	Grandes Ecoles	Total
New Enrollment (1)	69,378 97%	2,323 3%	71,705 100%
Graduates (2)	14,819 89%	1,826 11%	16,645 100%
Graduation Rate	21%	76%	23%
Drop-out Rate (3)	70%	22%	77%

(1) Average enrollment figures over 4 academic years, from 1984-1985 to 1987-1988.

(2) Enrollment for the 1987-1988 Academic Year.

(3) Calculated from other data in study

Notes: The percentage of new entrants has risen to 5.4%.
Table was translated from French into English.

[4]El Ouazzani, Khalid, op.cit., p. 242

The Grandes Ecoles which appear to be adapting more to market demands are described below:

a. Ecole Mohammédia d'Ingénieurs (EMI)

The EMI celebrated its 30-year anniversary last year. It is one of Morocco's most prestigious institutions having furnished well-qualified engineers to the public and industrial sectors since independence. Admission is highly selective and competitive.

Although the course curriculum is classic engineering school variety, the EMI has sought to adapt its training over the years to the changing demands of Morocco's economy. Since the early 1970s the EMI added additional departments, reflecting either trends in engineering science or evolution of the country's economy. Today the EMI has special departments covering computer engineering and electronics and majors in such specializations as energy, pollution control and engineering management.

There are now 7 technical departments offering 19 majors. The school expects its graduates to increase to 300 in just a few years.

The EMI offers each year approximately 20 highly technical training sessions of several days to a week for qualified engineers in Morocco. The sessions are publicized and attract technically competent candidates from the public and private sector. The courses are aimed to upgrade engineers in the latest techniques in complex areas, such as electronics and water control devices.

b. Ecole Hassania des Travaux Publics (ETHP)

Formed in 1971, the EHTP is similar to the Ecole Mohammédia d'Ingénieurs in Rabat in that it is a classical engineering school graduating highly trained specialists for the Moroccan private and public sector. It offers fewer areas of concentration, however, and has the only full-scale department of continuing education.

The EHTP concentrates on civil, electrical and irrigation engineering. It draws its students from the same pool of bac holders who pass the national concours for engineering schools. All students who pass this exam then spend two years of special preparation in math and the sciences at a few selected lycees. Students then are selected for the various engineering schools. After three more years at an engineering school students receive the engineering degree (ingénieur d'état).

Although most graduates previously joined the public sector, now more than 70% work in the private sector. Of these, apparently around 10% create their own companies (usually a consulting firm). To respond more closely to the needs of the private sector, the EHTP has over the years modified its curriculum to emphasize

acquisition of computer, communication and management skills increasingly required at the workplace in addition to a technical expertise. The school has approximately 65 professors (100% Moroccan) plus part-time instructors drawn from the prove sector. Each year the school holds a day-long internal review session where representatives of the private sector, the teacher corps, students and the administration critique the curriculum and recommend changes. Training programs are required in the private sector for all students.

The ETHP established a permanent Continuing Education division following recommendations made by participants at a 2-day colloquium in November 1988. The first year of operation included 5 training sessions on civil engineering, environment, remote sensing, computer and management all well attended by 120 engineers (half from the private sector). The 1990-91 series is expanded to 12 technical topics in 2-3 day sessions taught by visiting or local engineers. The first session in October (Betons à Hautes Performances) is organized in liaison with the prestigious French engineering school, the Ecole Nationale des Ponts et Chaussees.

The ETHP Continuing Education division is an excellent example of a state institution responding to a demand for training. Although the demand did not reach EHTP directly from owners of businesses in the private sector, the training seminars target former engineers and the general public at the cadres supérieurs level most of whom work for private companies. The management and computer courses are open to non-engineers as well.

c. Institut Supérieur de Commerce et de l'Administration des Entreprises (ISCAE)

This institution is Morocco's best-known management school. Founded roughly 20 years ago, ISCAE has shaped a reputation stretching far beyond North Africa. It is a relatively independent post-secondary institution offering rigorous training in management and business administration. One of the Grandes Ecoles, ISCAE falls under the Ministry of Commerce and Industry, graduating some of the country's top industry and banking leaders. This fall, ISCAE received 9,000 applications for 150 openings, vivid testimony either of the school's quality, the demographic crisis in Morocco, applicants' assurances of future earnings, or desperation on the part of the student body. The cumbersome selection process was simplified this year by making a first cut to 500 based on a review of candidates' applications, a second cut to 300 based on interviews, and a final cut to 150 based on a written exam.

Other institutions in Morocco offering management education, such as the Ecole Nationale de l'Administration Public (ENAP) and the university's Faculté de Droit are dwarfed by ISCAE's success in producing highly sought-after graduates. In fairness, neither ENAP, the classical French-style public administration school

mandated to train government civil servants, nor the university's law school could provide comfortable setting for a contemporary, intensive business management program.

This is not to say that ISCAE, nor the others, have been quick to modify curricula to the needs of the private sector. It currently offers its "cycle normal," a 4-year post-secondary management training program oriented exclusively toward the private sector. It is continuing an innovative program (cycle supérieur de gestion), whereby it accepts only students with a university degree and 3-4 years professional experience in the private sector. A special Masters-level degree is offered to students, again with 3-4 years work experience, who have a project. A new cycle d'expertise comptable has just been created to offer, for the first time in Morocco, the highest degree in accounting, the rough equivalent of the CPA. Previously Moroccans seeking this prestigious French professional standing had to go to France. Morocco has now established this degree officially and ISCAE is establishing the program.

To respond to growing demand to involve former students and the private sector more in its outreach, ISCAE has established a Continuing Education Program. A series of evening and weekend classes are offered throughout the academic years for cadres supérieurs of private companies. Classes are taught by ISCAE professors and are limited to 25 participants. Subjects include management, computer management, marketing and advertising, accounting and finance, and techniques and procedures for international commerce. There are three hours of classes per week.

At present, ISCAE does not offer an MBA degree in the American sense of the program -- although it comes closer to it than any other institution in Morocco. ISCAE does not have any linkages with U.S. institutions, but it does have a program with a French-Canadian university. Despite its stellar reputation, the institution is, according to several knowledgeable Moroccans, experiencing difficulties coping with the pressures and constraints of other state-controlled institutions.

d. Other Grandes Ecoles

Other state institutions which offer management or computer training and might adapt their curricula more easily to market demand are:

Institut Agronomique et Vetérinaire Hassan II
Ecole Nationale de l'Industrie Minérale
Ecole Nationale d'Agriculture de Meknes
Institut National des Statistiques et d'Economie Appliquée
Ecole Nationale d'Administration Publique
Ecole des Sciences de l'Information

A more thorough review of activities at these institutions would be necessary to determine to what extent training for the private sector could be strengthened.

The jury is still out as to whether public officials can stimulate reforms in higher education at a pace which satisfies the growing private sector. At least one Moroccan educational specialist has grave doubts that the national educational system can change fast enough.

> Il est peu probable que durant les prochaines années, le système productif national puisse connaitre des mutations en termes de structure d'emploi à même d'absorber cette nouvelle génération de diplômes, qui arriveront en masse sur le marché du travail. Aussi est-il ... primordial que ... les pouvoirs publics mettent en place à l'intention des bacheliers un système d'information relatif aux débouchés immédiats et futurs, susceptibles d'être offerts par les entreprises nationales. Encore faut-il que ces dernières soient en mesure d'appréhender leurs besoins en personnel qualifié.[5]

3. Vocational Education

Public higher education in Morocco had not attempted to prepare graduates for the private sector until the financial crunch of the 1980s forced rethinking. The state-run vocational sector, however, has always targeted the private sector in its training programs. Although it is beyond the scope of this report, the way business people view state-sponsored job training at any level can affect their receptivity to more technologically advanced training organized by the government. A few comments about vocational training are therefore in order.

The Office de la Formation Professionnelle et de la Promotion du Travail (OFPPT) runs 146 job training centers and 39 "institutes of applied technology" offering post-secondary technical diplomas. The OFPPT has grown tremendously since its inception in the 1970s in response to the demand to train high-school drop-outs and others eager to work but without skills. It has benefitted from significant international assistance, including a 5-year USAID-funded project to integrate Moroccan women into the building trades. In 1987 the centers trained 42,358 students in a typical range of vocational programs (electricity, plumbing, carpentry, brick-laying, computers, etc.). The OFPPT has by far the most adult education and evening courses of any organization. Although other government agencies conduct vocational training, the OFPPT had 60% of total enrollment.

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[5]El Ouazzani, Khalid, op.cit, p. 135.

As noted in Chapter III, the government levies a "professional training tax;" This tax provides revenues directly to the government agency overseeing all vocational training, the "Administration de la Formation Professionnelle." The funds underwrote a large expansion of training centers after 1984.

Whether or not the training offered by OFPPT centers is valued by the private sector, employers expect to recruit well-prepared, technically competent workers because they have already paid the tax to support the training. The introduction of the payroll tax had the unfortunate effect of raising expectations among business people who will largely be disappointed in the outcome. However, rarely does vocational training produce a graduate who can walk into a factory and begin operating a machine.

In designing a new program intended to address private sector training needs, USAID should keep abreast of developments in the vocational training sector. It may be opportune, at some point, to explore whether Morocco might be better served by changing its vocational training tax to an employer credit or deduction. In this way, each employer would be able to contract for employee training from any source and deduct the cost from what it would normally pay as the professional training tax. The tax would thereby serve as an <u>incentive</u> for firms to purchase training to meet the needs of their employees, be it at the managerial level or the vocational level. It would also create a more competitive environment in the training sector. Private and public training providers alike would be encouraged to strengthen their contacts with the business sector in order to ensure that more appropriate training is delivered.

CHAPTER V

A USAID STRATEGY FOR PRIVATE SECTOR TRAINING

To date, Moroccan businesses have been reluctant to invest in human resources, in part, because local educational and training programs rarely addressed their specific needs. That situation is changing. Some Moroccan training institutions are beginning to adopt a new orientation -- an orientation geared toward the end-users of training -- or increasingly, the Moroccan private sector. Local educational and training providers are beginning to ask what are the training needs of the private sector and how can they best respond to those needs.

These trends offer a unique opportunity for USAID, an opportunity to strengthen and utilize local resources for training. The Ernst & Young/Sigma Tech team recommends that the top priority for USAID's private sector training programs be the development of in-country training programs designed to meet the specific needs of the Moroccan private sector. In-country training should be complemented by a limited amount of short and long-term training in the U.S., in areas where Moroccan firms can benefit from U.S. expertise.

The focus on in-country training implies an increased need for access to local currency funding. In order to use resources most efficiently, dollar resources should be reserved for U.S.-based expenses, such as short and long-term training in the U.S. and U.S.-based technical assistance. Rather than converting scarce dollar resources to dirham, USAID and the GOM should seek to program existing sources of local currency for private sector training. An excellent source of dirham funding would be the local currencies generated through the PL-480 Program.

A. Strategy Goals and Objectives

The training needs of the private sector are clearly very diverse; no one type of program can possibly address the multitude of needs in the business community. We therefore recommend a portfolio of training activities to build in the flexibility needed to meet private sector needs. While these interventions may be diverse, they all serve to meet the following goals:

The primary goal is to foster private sector growth through the development of training programs adapted to the managerial and technical needs of Moroccan businesses.

A secondary goal is to strengthen the capacity of the public sector to create an environment conducive to private sector growth.

We propose five areas for USAID involvement in private sector training. Each area targets one of the following objectives:

OBJECTIVE 1: ON-GOING IDENTIFICATION OF PRIVATE SECTOR TRAINING NEEDS

On-going dialogue with the Moroccan private sector to identify and assess training needs should be at the core of the training project. This will ensure that USAID's programs are driven by the needs of the market -- the private sector. In addition, it will enable USAID to modify its training programs over time in response to the changing needs of the private sector.

A second, and perhaps more important reason, for on-going dialogue is to engage the private sector in the identification of its training needs. This is key to sensitizing Moroccan businesses to the need for investments in human resources. An increased private sector voice in the design of training activities will help to ensure increased private sector support for and participation in programs. Out-reach to the private sector, particularly in the early stages of training design, is really a first step toward marketing USAID's private sector programs. It should also help to build a constituency in the Moroccan private sector for USAID's training interventions.

OBJECTIVE 2: PROFESSIONAL TRAINING FOR PRIVATE SECTOR EMPLOYEES

The majority of USAID's private sector training resources should be invested in the development of managerial and technical skills in "cadre-level" employees. As outlined in Chapter III, the private sector needs and is willing to pay for training of its employees. What is needed, however, is the development of training programs that promote the development and application of new management and technical skills within the firm.

OBJECTIVE 3: STRENGTHEN IN-COUNTRY TRAINING CAPACITY

The relatively strong capacity of Moroccan higher education institutions offers USAID an opportunity to utilize in-country training resources for many private sector programs. As described in Chapter IV, certain technical institutions in the public sector and some of the more recently-created private management schools have made impressive progress in orienting training to the needs of the job market. However, much still needs to be done to improve the design of private sector oriented training. USAID assistance should aim to strengthen the capacity of local institutions to tailor their programs to the needs of private business.

OBJECTIVE 4: DEVELOPMENT OF ADVANCED TECHNICAL AND MANAGERIAL EXPERTISE

While most private sector training can and should be conducted using local resources, there are some areas where local expertise is not yet available and where the U.S. has a strong comparative advantage. Moroccan private sector firms recognize the value of U.S. expertise in the following areas: biotechnology, finance, telecommunications, industrial engineering, and business management.

OBJECTIVE 5: POLICY REFORM TO CREATE AN ENVIRONMENT CONDUCIVE TO PRIVATE SECTOR GROWTH

The public sector plays a central role in creating the appropriate incentives for private sector development. In its effort to promote private sector growth, USAID should provide training for key units within the government which influence the policy and institutional environment in which the private sector operates. Training to strengthen the government's ability to analyze the impact of existing regulations and the impact of regulatory reform has the potential for far-reaching benefits.

B. Training Targets and Interventions

The following sets of interventions are recommended to support the five program objectives outlined above:

OBJECTIVE 1: ON-GOING IDENTIFICATION OF PRIVATE SECTOR TRAINING NEEDS

TARGET GROUPS: PRIVATE SECTOR FIRMS
PROFESSIONAL AND BUSINESS ASSOCIATIONS

TYPE OF TRAINING: SEMINARS AND WORKSHOPS

INTERVENTIONS:

1. Create a private sector advisory board to provide direction to private sector training initiatives.

The establishment of a private sector advisory board has proven to be a very effective mechanism for "institutionalizing" dialogue with the private sector in a number of USAID-funded training programs. The purpose of the board would be to give the Moroccan business community an active voice in the identification and development of private sector training programs. The board should consist primarily of business leaders from diverse sectors. In addition, in accordance with USAID's strong commitment to increasing female participation in its training programs, women in business should be included on the board. USAID may also wish to consider the participation of public sector representatives, for example, from the Division de la Formation des Cadres, to ensure support from and coordination with the GOM.

2. Conduct a series of sector-specific workshops to involve the private sector in the process of identifying training needs.

A first step toward launching the private sector training program should be a series of small sector-specific workshops. The purpose of these workshops would be to involve the business community in the development of USAID's training programs -- again, to give the private sector a voice in the types of programs developed to serve its needs. While this training needs assessment was a first step toward meeting this objective, the team envisions that these small targeted workshops would provide a forum for in-depth discussions, and most importantly, the active involvement of the private sector.

3. **Commission diagnostic studies to examine specific technical or managerial problems facing private sector firms; incorporate findings in dialogue sessions with the private sector and in the design of private sector training programs.**

USAID has already funded several sector-specific diagnostic studies through the International Executive Service Corps. These studies, in addition to other studies to be commissioned under the project, would serve as valuable tools in the process of identifying private sector training needs. For example, they could be a spring-board for discussions in the workshops described above, or if conducted later in the project, they would be a good mechanism for up-dating USAID's information on private sector training needs.

4. **Collect, analyze and disseminate information related to private sector training needs.**

There is growing interest in the issue of private sector training needs in Morocco -- within the business community and the educational and training community. Some professional and business associations have established sub-committees to examine training needs within their sectors; on the educational side, the L'Ecole Supérieure de Gestion (ESG-Maroc) recently conducted a survey to determine whether its graduates had the qualifications desired by companies.

USAID can serve an important role in collecting and disseminating this type of information to businesses, and educational and training institutions. First and foremost, it would start to create a flow of information between the business community and the educational and training community -- two groups which have mutual interests, but which rarely communicate. Secondly, it is important for USAID to take advantage of some of the excellent research that is already being conducted within Morocco.

5. **Develop mechanisms to obtain feed-back from the private sector on USAID-financed training initiatives.**

The team believes that on-going feedback and evaluation of USAID's private sector training programs will be important to the success of the project. Indeed, the strategy's focus on short-term in-country training lends itself to this type of evaluation, as opposed to relying solely on mid-term and final project evaluations. A brief evaluation should be part of each training program conducted under the project. In addition, USAID should conduct an evaluation six months to a year after selected training programs to assess the impact of the program upon the firm and the participant's work. The results of these evaluations should be presented to the private sector advisory board to ensure better design and implementation of future programs.

OBJECTIVE 2: PROFESSIONAL TRAINING FOR PRIVATE SECTOR EMPLOYEES

TARGET GROUPS: MID AND SENIOR-LEVEL MANAGERS AND TECHNICIANS OF PRIVATE FIRMS

TYPE OF TRAINING: SHORT-TERM IN-COUNTRY TRAINING
INTERNSHIPS IN U.S. FIRMS

INTERVENTIONS:

1. Design short-term in-country training courses to address the specific training needs of Moroccan firms.

The results of the team's survey on private sector training needs showed that Moroccan businesses prefer short-term in-country training. In addition, the team found that the capacity to respond to private sector training needs is gradually emerging in Morocco. Nonetheless, at this point, professional training for the private sector is nascent. There are still relatively few good training programs geared to the professional needs of private sector employees. The team believes that this type of training should be the primary focus of the training project.

There are several dimensions to this intervention. One involves strengthening and expanding existing training programs to audiences which are currently untouched -- for example, small enterprises and firms outside of the Rabat-Casablanca corridor. Another dimension involves the creation of new training programs that are designed to meet a particular private sector need; such training might focus on a management or technical issue common to a sector or might involve the introduction of a new technology to a sector. The design of new private sector training programs should be supported by U.S. technical assistance, when necessary. All short-term training courses should be at least partially financed by the Moroccan private sector through tuition payments.

2. Provide short-term internships in U.S. firms.

Moroccan firms also expressed a keen interest in internships in American firms for their professional employees. AID's Entrepreneurs International Program would be an ideal mechanism for arranging such internships. The key to developing the program will be to market its availability to the private sector. Firms noted that they would be willing to contribute to the cost of the program by paying the airfare and the salary of the participant. An interesting follow-up activity to the program might be to allow the Moroccan participant to invite a counterpart from the U.S. firm to spend several weeks in Morocco. This could result in valuable technical assistance, but more importantly, could have benefits in terms of developing trade and investment between the U.S. and Morocco.

OBJECTIVE 3: STRENGTHEN IN-COUNTRY TRAINING CAPACITY

TARGET GROUPS: MOROCCAN EDUCATIONAL AND TRAINING INSTITUTIONS WITH A PRIVATE SECTOR ORIENTATION
-- private post-secondary management institutions
-- the grandes ecoles

TYPE OF TRAINING: SEMINARS/SHORT-TERM TRAINING
SHORT-TERM TECHNICAL ASSISTANCE

INTERVENTIONS:

1. Strengthen local institutions' ability to assess private sector training needs.

On-going assessments of private sector training needs is a key component of this strategy. However, equally if not more important to the long-term success of the project, is strengthening and institutionalizing that capacity within Morocco.

Representatives of Morocco's recently established private management schools often expressed the need to better understand the personnel needs of businesses. They need assistance in how to assess business training needs -- by sector, by geographic region, or in response to the request of an individual company. Seminars or a special course could be developed to achieve this objective.

2. Support the development of curricula and course materials to target private sector training needs.

USAID should provide short-term technical assistance to Moroccan institutions in the development of curricula and course materials to promote:

(a) the expansion of continuing education programs for senior level employees of private companies;

(b) more effective management and computer training in the recently created private institutions;

(c) the creation of new academic programs, such as agri-business management, which involve integrating management and marketing into existing technical programs; and

(d) the development of targeted interventions on behalf of a sub-sector or a company.

3. Establish mechanisms to foster linkages between the Moroccan educational and training sector and the business sector.

The United States has a number of excellent models of private sector industry and educational collaboration, such as the Milwaukee School of Engineering. As a start-up activity, the team recommends that USAID organize a one-month training session in the United States for key Moroccans **from both the educational and business sectors.** The aim would be to demonstrate to Moroccan business leaders and educators the potential for developing linkages between industry and educational/training institutions. A second objective would be to initiate dialogue between Moroccan firms and training institutions in an effort to start the process of developing closer linkages. As a follow-on activity, USAID should organize a series of in-country workshops to promote business and educational linkages.

PRIVATE SECTOR ORIENTED TRAINING INSTITUTIONS	Linkages	PRIVATE SECTOR COMPANIES
Directors	- -	Company Presidents
Professors/Trainers	- -	Professionals/Technicians

4. Strengthen the pedagogical and technical skills of educators and trainers within private sector oriented training institutions.

The United States has developed expertise in training methodology. The methodologies are increasingly being tested and applied in developing countries, including a number of francophone countries. With the expansion of business-oriented training and the increased use of practitioners as teachers, Morocco's fledgling private schools need and want help in introducing fresh training methods to technically competent teachers.

USAID's private sector training project should also offer specialized technical training in third countries and the U.S. for educators/trainers of Moroccan institutions. Training should be short-term and geared toward upgrading the technical know-how of proven trainers or professors.

OBJECTIVE 4: DEVELOPMENT OF ADVANCED TECHNICAL AND MANAGERIAL EXPERTISE

TARGET GROUP: SENIOR PROFESSIONALS OF PRIVATE FIRMS
SENIOR REPRESENTATIVES OF GOVERNMENT AGENCIES

TYPE OF TRAINING: LONG-TERM ACADEMIC TRAINING IN THE U.S.
IN-COUNTRY TRAINING SEMINARS LED BY U.S. EXPERTS

INTERVENTIONS:

1. Provide long-term academic training in the U.S. in select technical and managerial fields.

The team recommends that USAID provide long-term U.S. academic training to a very limited number of private sector participants and select representatives of Moroccan government agencies. While we recognize the value of U.S. post-graduate training, the investment required per participant is tremendous. More importantly, the Moroccan private sector -- with the exception of the very largest companies -- is generally unwilling to contribute to the cost of such training unless the participant is a family member.

The primary aim of long-term academic training for private sector participants would be to develop technical expertise in fields such as bio-technology, industrial engineering, telecommunications, and finance -- areas where high-level technical training is not available in Morocco. Participants from the public sector should be in a policy-making position, preferably in an area of government where their decisions have an impact on private sector development. It is recommended that all participants in long-term academic training have at least five years of experience in their profession.

Other USAID-financed projects may also serve to meet this objective. For example, the Mission's new agri-business project or the health care finance project might also provide sector-specific long-term training. The training project should clearly complement, rather than duplicate these efforts, and focus on areas not covered by the Mission's sector-specific projects.

2. Develop a series of seminars on advanced technological developments and trends.

Some of the larger firms interviewed by the team expressed a need for information on recent technological advances in their fields. They view the U.S. as the prime source of such expertise. To fill this need, the team recommends that USAID support occasional seminars on advanced technological themes. One audience for these seminars would be senior-level technicians and scientists from private firms and research institutes, who need to keep abreast of technical trends. Another important audience would be top-level business managers, who need to keep abreast of economic and market trends.

OBJECTIVE 5: POLICY REFORM TO CREATE AN ENVIRONMENT CONDUCIVE TO PRIVATE SECTOR GROWTH

TARGET GROUP: POLICY-MAKERS IN THE MOROCCAN GOVERNMENT
PROFESSIONAL AND BUSINESS ASSOCIATIONS

TYPE OF TRAINING: IN-COUNTRY SEMINARS AND WORKSHOPS
SHORT-TERM OVERSEAS TRAINING

INTERVENTIONS:

1. **Provide training to strengthen the government's ability to analyze the impact of existing regulations and the impact of regulatory reform.**

Morocco has already undertaken significant reforms to promote the development of its private sector. USAID's training project can reinforce and strengthen the government's reform effort through training. The type of training should remain flexible to respond to the needs of the Moroccan government and the private sector. However, an example of the type of training which could be provided under this component is A.I.D.'s course on privatization for senior executives. This course might be very relevant given its focus on implementation of privatization strategies and Morocco's commitment to pursuing privatization. Other relevant topics might be regulatory and administrative reform, capital markets development, fiscal reform, and commercial law reform.

Another area to be closely examined is policy reform that is directly related to promoting training. A number of countries have adopted very effective policies to finance training for private sector employees. A study tour, composed of representatives from the Moroccan government and the private sector, could be very valuable in terms of demonstrating the impact of alternative policy models.

C. Implementation Options

Managing the portfolio of training activities proposed in this strategy will call for far more intensive implementation within Morocco. The management burden on USAID mission staff in this period of budget reductions is on the minds of all those responsible for project design. Indeed, failure to address **realistically** the complex management consequences of various training interventions will compromise the ultimate impact of well-conceived initiatives. While there are clearly a variety of implementation options that the mission may wish to consider, we have explored two possibilities.

Option 1: Expand the USAID Training Office

Some missions choose to manage their training projects from within. Indeed, USAID/Morocco has successfully administered its large training project on an in-house basis for many years. However, it is important to recognize that the management/implementation tasks inherent in in-country training programs are very different from that of U.S.-based training programs. One could also argue that private sector training in and of itself implies different types of management tasks than does training geared to the public sector.

Thus far, USAID's training project has involved very little in-country training. The Mission, in close collaboration with its counterparts in the Direction de la Formation des Cadres, has focused primarily on careful selection on a one-by-one basis of candidates for short-term and long-term training in the U.S. The management burden, while not to be under-estimated, has focused on the administration and monitoring of U.S.-based training for public sector employees.

The mission would have to significantly increase its in-house staff in order to launch the private sector training activities proposed in this strategy, particularly while continuing to manage its ongoing overseas programs under the current training project. There are clearly some advantages to internal management: most importantly, all training activities are centralized under one roof and project funds can be used for training, as opposed to contract management. However, in light of the crunch on operating expenses, it would seem unrealistic to assume significant expansion of the training office. Furthermore, we believe it is important to strengthen and rely on in-country capacity to manage training initiatives as part of the new project.

Option 2: "Partnership" of a U.S. Firm and a Moroccan Firm to Manage Private Sector Training Initiatives

Given the importance of in-country training, as well as specialized U.S. expertise involved in the proposed strategy, we believe the most effective implementation option would involve the combined expertise of a U.S. firm and a Moroccan firm. As part of the bidding process, a U.S. firm would be required to propose a Moroccan partner, preferably a private consulting firm with the requisite training and private sector expertise. The U.S. and the Moroccan contractor would jointly launch and administer the diverse private sector initiatives proposed in this strategy, under the guidance of the USAID training office. To take advantage of existing expertise, USAID should probably continue to rely on the Office of International Training (OIT) network for placement and monitoring of short and long-term training participants in the U.S.

Whether a U.S. manager based in Morocco is required to launch and implement such initiatives is a key issue for project design. We strongly believe that in-country training is the "answer" to private sector training needs, but we do not underestimate the management required to launch this initiative. The Mission must carefully consider the costs and benefits of various mixes of local management and U.S. management. The concept of a "partnership" of a U.S. firm and a local firm offers some creative opportunities for management. For example, rather than creating yet another project office with all of the headaches and delays in procuring telephone, telex, etc., one option may be to use the local firm as the locus of the project; if a long-term American manager is needed, s/he could operate from the base of the local firm. One of the criteria for selecting the local firm would be its existing capacity to "house" such a project.

D. Marketing Strategies

The private sector has rarely come to USAID to seek out training possibilities. In fact, with a few exceptions, most Moroccan firms are totally unaware of USAID's training programs. USAID's new directions call for new approaches to marketing and promoting training: approaches that are pro-active, rather than reactive.

The critical question is with whom and how should USAID communicate its training programs. The fact that there is no single interlocutor for communicating information to the private sector poses special challenges -- and clearly reinforces the need for moving beyond internal management and implementation of training programs. The survey results presented in Chapter III revealed that Moroccan firms prefer direct communication with USAID, either in person or by mail. This is part of the reason that we have recommended on-going dialogue with the private sector as a key objective of the strategy. Dialogue sessions with the private sector via sectoral focus groups should be the first step toward marketing the training project. The target audience for such focus groups should be the directors/senior managers

of private sector firms. It is they who need to realize (i) the need for training among their employees, and (ii) the value of investing in human capital.

Experience to date demonstrates that marketing should not be limited to the "upper echelons" of the firm. A letter sent to the director of a firm often never reaches the people who need such training. It is important to market training programs at various levels within the firm: at the level of top management to sensitize directors to the need and value of training, but equally, if not more important, directly to the individual to be trained. S/he can serve as a very effective advocate vis-a-vis top management for encouraging private sector participation in training programs.

Various approaches to marketing USAID's training programs will need to be explored and tested as part of project implementation. It is premature to outline all of the possible marketing issues/strategies at this early stage. Nonetheless, based on the results of the assessment, we believe USAID should consider the following factors in project design.

- Pro-active marketing will be essential to the success of private sector training initiatives. The project must, in effect, <u>create</u> and <u>respond to</u> demand for training.

- Because there is no single interlocutor for reaching the Moroccan private sector, USAID must access a variety of mechanisms for marketing private sector training programs. The professional and business associations are one of many vehicles for marketing training programs; they should not be the only vehicle.

- Direct dialogue and communication with the private sector should be at the core of USAID's marketing strategy.

- USAID should build on and reinforce the marketing strategies of training institutions providing training under the project in an effort to strengthen local capacity to serve private sector training needs.

ANNEX 1

List of Contacts

ANNEX 1

LIST OF CONTACTS

I. MOROCCAN BUSINESSES

A. Agri-Business

1.	AGREX MAROC Seed Production and Distribution Quartier Industriel Sidi Brahim, Fes Tel: (06) 412.47 - 423.71	M. Chami Louafi Directeur Général
2.	CMC* Coopérative Marocaine de la Conserve 26, Bd. Al Moukaouma B.P. 13639, Casablanca Tel: 30.12.37 - 30.03.77	M. Lucien Cohen Directeur Commercial
3.	FRUMAT* Fruitière Marocain de Transformation Production of Fruit Juice 45, Avenue de l'Armée Royale B.P. 13155, Casablanca Tel: 31.28.40 - 31.36.89	M. Benhallam Responsable du Personnel
4.	GUM INDUSTRIE Carob Processing for Chewing Gum Ben Souda, Fes Tel: (06) 513.42	M. Gilles Ribo Directeur
5.	LES HUILERIES DE MEKNES Olive Processing and Canning Quartier Sidi Said B.P. 2021, Meknés Tel: (05) 300.84/91/92	M. Hassan Eddaoudi Directeur Général M. Hassani, Engineer M. Nhir, Engineer
6.	MAG CONSERVES* Vegetable and Fruit Canning Route 110, Km 10 Ain Sebba, Casablanca Tel: 35.08.26 - 35.14.42	M. Khalifi Directeur Général

* Firm participated in the survey of 31 Moroccan firms.

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7. SICOPA
Olive and Caper Processing
Quartier Industriel Sidi Brahim
B.P. 2049, Fes
Tel: (06) 418.87

M. Benzakour
Gerant

8. SUNABEL*
Sucrerie Nationale de Betteraves du Loukkos
18, Rue de Taza, B.P. 4408, Rabat
Tel: 236.37 - 236.47 - 314.38

M. Abounidane
Directeur Général

9. SUNAG*
Sucreries Nationales du Gharb
15, Avenue Hassan II
B.P. 32, Rabat
Tel: 250.95 - 253.16

M. Baghdadi
Chef de la Division Financière

10. SUPERLAIT*
8, Rue Soldat Emile Brunet
Casablanca
Tel: 24.18.81

M. Zaze
Coopérateur

B. Textiles and Leather

1. BLANCATEX*
Garment Production
33, Allée de Troènes
B.P. 2514 Ain Sebâa, Casablanca
Tel: 35.27.34 - 35.07.87

M. Laraki
Président

2. CARPETEX*
Fabric Production
K. 110, Route des Zenata
Casablanca
Tel: 35.32.71

M. Said Baba
Directeur Administratif

3. COGEGUIR*
Confection Générale du Cuir
171, Rue Haj Amar Riffi
Casablanca
Tel: 31.83.02

M. El Yousfi
Directeur Général

* Firm participated in the survey of 31 Moroccan firms.

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4.	CONFECTOR* Garment Production 20, Rue Mostapha, El Maani Casablanca Tel: 31.07.01 - 31.09.47	M. Benabdesslem Directeur Général Adjoint
5.	COOPERATIVE ARTISANALE DES TISSEUSES DE TAPIS ET HANBELS DE SALES Bab M'sadek, Salé Tel: 892.56	Mme. Rabha Touil Presidente
6.	MANUCUIR Manufacture de Cuirs de Meknès Km. 2 Route Agouray, Meknès Tel: 386.89 - 368.77	M. Kabir Directeur Général
7.	MIDEF Maroquinerie Industrielle de Fes Quartier Sidi Brahim, Rue 811, Fes Tel: (06) 419.41 - 420.22	M. Abdelmalek Tazi Directeur Général
8.	SAFT* Fabric Production 5, Avenue Maghrib, Al Arabi B.P. 64, Rabat Tel: 278.83 - 278.82	M. Abdelilah Kabbaj Directeur Général

C. <u>Electrical-Mechanical Industries</u>

1.	CARNAUD MAROC* 83, Blvd. Ba Ahmad, B.P. 2201 Casablanca Tel: 24.74.45	M. Sekkat Secrétaire Général
2.	CEEM Entreprise* Compagnie Electrique et Electronique du Maroc, Rue de Benghazi Résidence de Tarfaya, Rabat Tel: 633-51	M. Pulank Directeur Technique

* Firm participated in the survey of 31 Moroccan firms.

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3.	CGE* Compagnie Générale d'Eléctricité B.P. 13807, Casablanca Tel: 30.72.72	M. Moutaouakil Chef de Service Personnel
4.	ESMAFOR* Ironworks Zone Industrielle Tabriquet B.P. 650, Salé Tel: 78.60.59	M. Abderrahmane Elamri Directeur Général
5.	MERLIN GERIN MAROC* Manufacturer of Electronic Equipment 68, rue Mohamed Diouri, Casablanca Tel: 30.39.87 - 31.65.80	M. Azeddine Sebti Directeur Général
6.	MODULEC* Société Industrielle d'Appareillage Electro-Mécanique, Km 3 Route de Kénitra, B.P. 146, Salé Tel: 78.25.50	M. Abdellah El Orch Directeur Général
7.	SCIF: Société Cherifienne de Materiel Industriel et Ferroviaire Allée des Cactus, Ain es-Sebba Casablanca Tel: 35.10.93	M. Mohamed Ouriaghli Directeur Général
8.	S.G.S. Thomson Maroc* Assembly of Electronic Parts Route de Rabat, B.P. 26-16 Ain Sebâa, Casablanca Tel: 35.08.44 - 35.02.31	M. Loukili, Training/ Communication Manager
9.	SOMACA: Société Marocaine de Constructions Automobiles Km 12, Route de Rabat Casablanca Tel: 35.84.11	M. Larbi Koullou Chef du Personnel et de la Formation

* Firm participated in the survey of 31 Moroccan firms.

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D. Construction

1.	APCOM Road Construction 49, Avenue Atlas Agdal, Rabat Tel: 770.426 - 773.188	Mme. Nezha Lagrich Office Manager
2.	DOLBEAU* 81, Rue Karatchi, Casablanca Tel: 30.41.82 - 30.68.38	M. Belkhadir Directeur Général
3.	SADET* Société Arab du Développement des Technologies de Construction 16, Bel Air, B.P. 4175, Temara Tel: 414.43 - 414.44	M. Serghini Directeur Général
4.	SET* Société d'Etudes et Travaux Bd. Al Amir Fal ould Oumeir Rue Jbel Al Ayyachi, Imm 32, Rabat Tel: 77.12.87	M. Hajoui Directeur Général Adjoint
5.	SOTERRAB* Société de Terrassements et Bâtiments 43, Bd. de Jerrada, Casablanca Tel: 25.46.43 - 25.94.56	M. Mustapha Atifi Chef du Service Approvisionnement
6.	STRATEC* Société de Travaux Techniques 1, Rue de Capitaine Puissesseau Angle Bd. Al Mouquaouama, Casablanca Tel: 31.85.65 - 30.94.41	Mme. Yvette Abergel Secrétaire Général

* Firm participated in the survey of 31 Moroccan firms.

E. Tourism

1.	ATLAS VOYAGE* Travel and Tourist Agency 44, Avenue de l'Armée Royale Casablanca Tel: 31.16.07 - 31.80.71	Mme. Nezha Amrani Directeur Marketing
2.	HOTEL ATLANTIS* Four-Star Hotel Blvd. de la Corniche, Casablanca Tel: 36.04.04	M. Boukhri Directeur Général
3.	HOTEL BELERE* Four-Star Hotel 33, Avenue Moulay Youssef, Rabat Tel: 76.37.49 - 76.38.87	M. Ali Berdai Directeur Général Adjoint
4.	HYATT REGENCY* Five-Star Luxury Hotel Quartier Souissi, Rabat Tel: 712.34	M. Dich Directeur Général Adjoint
5.	KASBAH TOURS INTERNATIONAL MAROC* Tour Operator 432, Rue Mustapha, El Maani Casablanca Tel: 27.14.04 - 22.38.20	M. Seddini, Directeur d'Exploitation

F. Environmental Businesses

1.	CASABLOC* Solar Energy 163, Rue Haj Amar Riffi, Casablanca Tel: 31.81.30 - 31.81.40	M. Yves Desbois Administrateur Fondateur
2.	PROTEC* Water Treatment 625, Blvd Mohamed V, B.P. 2019 Casablanca Tel: 24.84.41	M. Gaign Directeur Général

* Firm participated in the survey of 31 Moroccan firms.

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G. Other

1.	ASTRAL CELLUCO* Manufacturer of Paints and Varnish 64, Blvd Moulay Slimane, B.P. 10610 Roches Noires, Casablanca Tel: 35.45.04 - 35.49.08	M. Michel Laugier Directeur Général
2.	ONA Group 52, Avenue Hassan II Casablanca Tel: (02) 22.41.02	M. Robert Assaraf, Directeur Général M. Benmakhlouf, Dir. Administratif et des Ressources Humaines

II. MOROCCAN EDUCATIONAL AND TRAINING INSTITUTIONS

A. Public Sector Institutions

1.	ECOLE HASSANIA DES TRAVAUX PUBLICS (EHTP) Km. 7, Rte. d'El Jadida, B.P. 8108 Casablanca Tel: (02) 23.07.13 - 23.07.17	M. Mohamed Tachafine Directeur des Etudes M. Ali Agoumi Dir.FormationCont
2.	ECOLE MOHAMMADIA D'INGENIEURS (EMI) (part of Université Mohammed V) Avenue Ibn Sina, B.P. 765 Rabat, Agdal Tel: 751-29	M. Mohamed Kouam Directeur Adjoint
3.	FACULTE DES SCIENCES JURIDIQUES ECONOMIQUES ET SOCIALES (Université Mohammed V) Bd. des Nations Unies, B.P. 721 Rabat, Agdal Tel: 726-16	M. Omar Mouddani Vice Doyen et Professeur en Droit
4.	INSTITUT SUPERIEUR DE COMMERCE ET DE L'ADMINISTRATION DES ENTREPRISES (ISCAE) Km. 9.5, Rte de Nouasseur, B.P. 8114 Casablanca Tel: 23-06-66	M. El Alani Directeur

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B. Private Institutions

1.	ECOLE CENTRALE D'INFORMATIQUE ET DE GESTION DES ENTREPRISES (ECIGE) Ave. Hassan II, Bab El Mellah Rabat Tel: 721.044 - 733.402	M. Mohamed Benallou Dir. Administratif M. Ahmed Skalli Directeur des Etudes
2.	ECOLE SUPERIEUR DE GESTION (ESG) 4 à 18, Rue Colbert Casablanca Tel: 31.55.55	M. K. El Ouazzani Dir. Pédagogique
3.	INSTITUT DES HAUTES ETUDES ECONOMIQUES ET SOCIALES (IHEES) 3, Rue Caporal Corras Casablanca Tel: 30.01.95	Mme. Godefroit
4.	INSTITUT DES HAUTES ETUDES DE MANAGEMENT (H.E.M.) 52 Ave de Nador, Polo 21400 Casablanca Tel: 21.74.34	Prof. Bekouchi Directeur Mme. Benamour-Lahrichi Nezha Conseillere au Dev. M. El Bermaki Directeur des Etudes

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III. MOROCCAN PRIVATE SECTOR ASSOCIATIONS

AMIT: Association Marocaine des Industries Textiles 58, Rue Lughérini, Casablanca Tel: 30.03.93 - 30.04.42	M. Mohamed Tazi Secretaire Gén. Adj. Mme Dakhama Afaf Benani Directrice des Relations Publiques
ASP: Association Professionnelle Sucriere, 29, Avenue Al Abtal Agdal, Rabat Tel: 774.675 - 771.698	M. Mohamed Debbarh, Pres. PDG de la SUNAB M. Mohamed Belghiti Secrétaire Général
CGEM: Confédération Générale Economique Marocaine 23, Blvd Mohamed Abdou Casablanca Tel: 25.26.96	M. Mohammed Belarbi -- Président, Commission Sociale et de la Formation Professionnelle -- Directeur Général de la SOMACA
Chambre de Commerce et d'Industrie 98, Blvd Mohammed V Casablanca 01 Tel: 26.43.27	M. Brahim El Amiri Directeur Général
FICOPAM: Fédération des Industries la Conserve des Produits Agricoles du Maroc, 77 Rue Mohamed Smiha Casablanca 01 Tel: 30.97.62 - 30.39.53	M. Mohamed El Jamali Président
FIMME: Fédération des Industries Metallurgiques, Mécaniques et Electriques du Maroc 147, Rue Mohamed Smiha, Casablanca Tel: 30.16.83 - 30.20.34	M. Abdelouahab Lahrichi Secrétaire Général
Institut Sucrier d'Etudes de Recherche et de Formation 67, Rue Jaafar As-Sadik Agdal, Rabat Tel: 771.792 - 779.325	M. M'hamed Yassine Directeur Général

IV. MOROCCAN GOVERNMENT OFFICIALS

M. L'Hosein Benali
Directeur des Affaire Juridique
Ministère de l'Education National

M. Gouitaa
Chef de Service
Ministère du Plan, Rabat

M. Saad Hassar
Directeur de la Formation des Cadres
Ministère des Travaux Publics

V. USAID

Dennis Chandler	Director
Linda Morse	Deputy Director
Joyce Holfeld	Chief, Office of Population and Human Resources
Monique Bidaoui	Training Officer
James Lowenthal	Chief, Office of Agriculture
Richard Burns	Chief, Office of Project Development and Private Enterprise
Aleksandra Braginski	Project Development Officer
Criss Juliard	Private Sector Advisor

VI. OTHERS

International Executive Service Corps, Tour Atlas, 5eme Etage Casablanca 01	Pierre Lansel Directeur Général
The World Bank Population and Human Resources Technical Department, EMENA 1818 H Street, N.W. Washington, D.C.	Pierre Mersier Technical/Vocational Specialist

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ANNEX 2

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ANNEX 2

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The World Bank, "Morocco: The Impact of Liberalization on Trade and Industrial Adjustment," Volume I, Executive Summary Report, March 15, 1988.

In addition, the team reviewed the brochures and catalogs from the following educational and training institutions:

-- HIGH TECH: (High Technologie School in Morocco)
10 Rue El Yamama, Rabat

-- ECOLE SUPERIEURE D'INFORMATIQUE ET DE GESTION (ESIG)
Fes and Casablanca

-- INSTITUT SUPERIEUR DU GENIE ELECTRIQUE (ISGE)
Casablanca (part of Groupe I.G.A. with IHEES)

-- ECOLE FRANCAISE DES AFFAIRS (EFA)
Rte. de l'Unité, Casablanca
(A Moroccan institution associated with the Chambre de Commerce et d'Industrie du Maroc)

-- INSTITUT MAROCAIN DE MANAGEMENT (IMM)
Casablanca

-- INSTITUT SUPERIEUR DES ARTS ET METIERS (ISAM)
Casablanca

-- INSTITUT SUPERIEUR DE GESTION ET DE COMMERCE (ISG)
Casablanca

-- INTERNATIONAL INSTITUTE FOR HIGHER EDUCATION, Rabat
(A 2-year computer/management course taught in English)

-- SUP DE CO: Ecole Superieure de Commerce, Marrakech

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ANNEX 3

Questionnaire

BESOINS EN FORMATION DU SECTEUR PRIVE MAROCAIN

QUESTIONNAIRE

Le but de cette enquête est de recueillir des renseignements sur les besoins de formation du secteur privé marocain. Cette enquête est menée pour le compte de l'Agence Américaine pour le Developpement International (USAID) et la Direction de la Formation des Cadres (DFC) du gouvernement marocain. Ces renseignements permettront à l'USAID et à la DFC de formuler une stratégie pour établir des programmes de formation pour les années à venir.

Les renseignements obtenus ci-dessous resteront confidentiels.

NUMERO DU QUESTIONNAIRE : |__|__|__|__|__|

DATE : |__|__|__|9|0|

TITRE DE LA PERSONNE INTERVIEWEE :

- ☐ Propriétaire de l'Entreprise
- ☐ Directeur Général
- ☐ Secrétaire Général
- ☐ Directeur de Production
- ☐ Directeur Administratif
- ☐ Autre (précisez)

SECTION 1 : RENSEIGNEMENTS GENERAUX A PROPOS DE L'ENTREPRISE

1. Lieu où se trouve l'entreprise [ville] :

- ☐ Rabat
- ☐ Casablanca
- ☐ Fès
- ☐ Meknes
- ☐ Marrakech

2. Depuis combien de temps l'entreprise existe t-elle ? |__|__| ans

3. Dans quel secteur vous situez-vous ?

- ☐ Agro-alimentaire
- ☐ Textile/Cuire
- ☐ Electro-Mécanique
- ☐ Tourisme
- ☐ Bâtiment
- ☐ Autre (Précisez)

4. Quel était le chiffre d'affaires de l'entreprise l'année dernière ? ..... DH.

5. Quel pourcentage de vos ventes directes attribuez-vous aux marchés suivants ?

a. Au Maroc : ..... %
b. Exportation vers les marchés européens : ..... %
c. Exportation vers l'Amérique du Nord : ..... %
d. Exportation vers d'autres marchés : ..... %

SECTION 2 : FACTEURS RESPONSABLES DE LA PERFORMANCE DE L'ENTREPRISE

6. Comment votre volume de vente a-t-il évolué au courant de l'année passée ?

☐ S'est amélioré de plus de 20 %
☐ S'est amélioré de moins de 20 %
☐ S'est détérioré de plus de 20 %
☐ S'est détérioré de moins de 20 %

☐ N'a pas évolué

7. Quelle évolution de votre volume de vente estimez-vous pour l'année prochaine ?

☐ Va s'améliorer de plus de 20 %
☐ Va s'améliorer de moins de 20 %
☐ Va se détériorer de moins de 20 %
☐ Va se détériorer de plus de 20 %

☐ Ne va pas évoluer

8. Comment les facteurs suivants ont-ils affecté votre volume de vente au courant de l'année passée ?

[1]. Positif [2]. Négatif [3]. Sans effet

a. Demande locale pour le produit	:	1	2	3
b. Demande extérieure pour le produit	:	1	2	3
c. Compétition des autres entreprises marocaines	:	1	2	3
d. Compétition des entreprises étrangères	:	1	2	3
e. Réglementations du gouvernement	:	1	2	3
f. Accès au capital	:	1	2	3
g. Disponibilité des cadres	:	1	2	3
h. Disponibilité des techniciens	:	1	2	3

9. Avez-vous formulé un plan précis pour investir dans un des domaines suivants ?

a. Formation du personnel	☐ Oui	☐ Non
b. Amélioration de la technologie de production	☐ Oui	☐ Non
c. Investissements immobiliers	☐ Oui	☐ Non
d. Marketing	☐ Oui	☐ Non
e. Contrôle de la qualité	☐ Oui	☐ Non
f. Economie d'énergie	☐ Oui	☐ Non
g. Contrôle de la production	☐ Oui	☐ Non

SECTION 3 : LES EMPLOYES DE L'ENTREPRISE

10. a) Nombre d'employés à plein temps : .....

b) Nombre d'employés saisonniers : .....

11. Combien de vos employés occupent chacune des catégories suivantes ?

Employés	Nombre total	Nombre de femmes
a) Cadres de direction	.....	.....
b) Cadres techniques (Ex : ingénieurs, économistes)	.....	.....
c) Cadres administratifs (Ex : employés de la comptabilité, employés du personnel)	.....	.....
d) Techniciens (Ex : électriciens, plombiers)	.....	.....
e) Ouvriers	.....	.....

12. Quel niveau d'éducation exigez-vous pour les types de personnels suivants :
(Côchez la case correspondante à chaque niveau exigé)

Niveaux	Certificat d'études Secondaires	Bac	Licence ou Maîtrise	Doctorat ou Diplôme d'ingénierie
Cadres de Direction				
Cadres Techniques				
Cadres Administratifs				

13. Pour les types des personnels suivants, veuillez spécifier la difficulté à obtenir du personnel ayant l'expérience et la formation nécessaire pour votre entreprise ?

[1]. Difficile [2]. Moyenne [3]. Facile

- Cadres de direction : 1 2 3
- Cadres techniques : 1 2 3
- Cadres administratifs : 1 2 3

14. Comment procédez-vous lorsqu'un poste de cadre se trouve libre dans votre entreprise ?

- ☐ Promotion des employés au sein de l'entreprise
- ☐ Recrutement en dehors de l'entreprise
- ☐ Embauche de nouveaux diplômés

15. Vos employés ont-ils accès à des stages de formation par l'intermédiaire de votre entreprise ? ☐ Oui ☐ Non

16. Quels types d'employés suivent des stages de formation ?

a. Cadres de direction	☐ Oui	☐ Non
b. Cadres techniques	☐ Oui	☐ Non
c. Cadres administratifs	☐ Oui	☐ Non
d. Techniciens	☐ Oui	☐ Non
e. Ouvriers	☐ Oui	☐ Non
f. Autres (Précisez)	.....	

17. • Comment la formation est-elle donnée ? (cochez la case correspondante)

	Au sein de l'entreprise	En dehors de l'entreprise	
		Au Maroc	A l'étranger
Cadres de Direction			
Cadres Techniques			
Cadres Administratifs			

• Quelles organisations donnent des stages de formation pour vos employés et comment évalueriez-vous la qualité de leurs stages ? ([1] : Exellente, [2] : Moyenne, [3] : Médiocre)

Organisations	Evaluation		
.....	1	2	3
.....	1	2	3
.....	1	2	3
.....	1	2	3
.....	1	2	3

18. Quels changements dans vos besoins de formation en gestion dans les domaines suivants envisagez-vous au cours des cinq prochaines années ?

[1]. Augmentation [2]. Diminution [3]. Pas de changement

a. Gestion des ressources humaines	:	1	2	3
b. Gestion financière	:	1	2	3
c. Gestion administrative	:	1	2	3
d. Etude des marchés	:	1	2	3
e. Stratégies de marketing	:	1	2	3
f. Planification stratégique de l'entreprise	:	1	2	3
g. Gestion des stocks	:	1	2	3
h. Autre (précisez) :	:	1	2	3

19. Quels changements dans vos besoins de formation technique dans les domaines suivants envisagez-vous au cours des cinq prochaines années ?

[1]. Augmentation [2]. Diminution [3]. Pas de changement

a. Technologie de production	:	1	2	3
b. Design des produits	:	1	2	3
c. Conditionnement	:	1	2	3
d. Contrôle de la qualité	:	1	2	3
e. Conservation de l'énergie	:	1	2	3
f. Contrôle de la pollution	:	1	2	3
g. Autre (précisez) :	:	1	2	3

20. Quels changements dans vos besoins de formation dans les domaines suivants envisagez-vous au cours des cinq prochaines années ?

[1]. Augmentation [2]. Diminution [3]. Pas de changement

a. Informatique	:	1	2	3
b. Comptabilité	:	1	2	3
c. Négociation des contrats	:	1	2	3
d. Anglais commercial	:	1	2	3
e. Connaissance de la réglementation, commerce international	:	1	2	3
g. Autre (précisez) :	:	1	2	3

21. Accepteriez-vous de financer des stages de formation pour vos employés ?

☐ Oui ☐ Non

22. Si un séminaire pour cadres de trois jours était proposé dans un sujet qui intéresse votre entreprise, quel montant accepteriez-vous de payer par employé?

☐ Moins de 1 000 Dh ☐ Entre 1 000 et 3 000 Dh

23. • Combien de temps permettriez vous à un cadre de s'absenter pour suivre un stage de formation ?

☐ Entre 1 et 2 jours ☐ Jusqu'à un mois
☐ Jusqu'à une semaine ☐ Jusqu'à six mois

• Combien avez-vous dépensé l'année passée pour financer des stages de formation pour vos employés ? ..... Dh.

24. Accepteriez-vous de continuer à payer le salaire d'un cadre qui suit un stage de plus d'un mois ? ☐ Oui ☐ Non

25. Si l'un de vos cadres suivait un stage de plus de six mois, seriez-vous disposé à lui garantir un poste à son retour ? ☐ Oui ☐ Non

26. Avez-vous des préférences en ce qui concerne le lieu du stage de formation ?
☐ Oui ☐ Non

27. Où préfériez-vous que le stage ait lieu ?

☐ Au Maroc ☐ En Europe
☐ Aux Etats-Unis ☐ Autre

SECTION 4 : ASSOCIATIONS

28. Etes-vous affiliés à des associations professionnelles ? ☐ Oui ☐ Non

• Si oui, précisez lesquelles :
1. .....
2. .....
3. .....

29. Ces associations vous offrent-elles des possibilités de formation ? ☐ Oui ☐ Non

• Si oui, précisez quelle association : 1 2 3

30. Etes-vous au courant des programmes de formation offerts par l'intermédiaire de l'USAID ?

☐ Oui ☐ Non

31. Si oui, comment en avez-vous entendu parler ? .....
.....

32. Si l'USAID devait fournir des renseignements sur ses programmes du secteur privé, quel serait un bon moyen de les communiquer?

Par la Chambre de Commerce	:	☐ Oui	☐ Non
Par la CGEM	:	☐ Oui	☐ Non
Par les associations professionnelles	:	☐ Oui	☐ Non
Par le Gouvernement marocain	:	☐ Oui	☐ Non
Par la presse	:	☐ Oui	☐ Non
Par d'autres moyens (précisez)	:	.....	

33. Est ce que vous auriez d'autres commentaires en ce qui concerne vos besoins de formation ou bien le rôle que l'USAID pourrait jouer pour répondre à vos besoins ?

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Merci pour votre collaboration.

Numéro du questionnaire : |__|__|__|__|__|__|

Nom de la personne interviewée : .....

Nom de l'Entreprise : .....

Adresse : .....
.....
.....

Tél. : .....

ANNEX 4

Summary Data on Private Post-Secondary Institutions

BESOINS EN FORMATION DU SECTEUR PRIVE MAROCAIN

Ecole	Filières et options							Possibilité d'accè aux études supérieur
	Stage en Entrep.	Gestion et Finances	Gestion et Informatique	Gestion et Commerce	Commerce International	Gestion Tourisme et Hôtelière	Création et reprise d'entreprise	[2] : 2ème Cycle [3] : 3ème Cycle
ESG	4 Oblig.	1	1	1	1	0	0	3
I.h.e.e	2 Oblig.	1	1	1	0	1	0	3
ISIG	3 Oblig	0	1	0	0	1	1	3
IGA	2 Facultà.	1	1	0	0	1	0	2
IBI	1 oblig. 1 Facultà.	0	0	0	1	0	0	2
EFA	2 Oblig.	<---------- Formation générale ---------->						2
I.I.H.E	2 Oblig. 1 Facult.	1	1	1	0	0	1	3
ISCAE	4 Oblig.	1	1	1	1	0	0	3
Sup. de Co	4 Oblig.	1	1	0	1	1	1	3
I.S.G.	1 Oblig.	1	1	0	0	0	0	2
I.M.M	3 Oblig.	1	0	0	1	0	1	3
H.E.M	4 Oblig.	1	0	0	1	1	1	3

BESOINS EN FORMATION DU SECTEUR PRIVE MAROCAIN

Tableau récapitulatif des écoles de gestion au Maroc

Ecole	Date de création	Conditions d'admission	Durée de formation	Nombre d'étudiants	Frais de scolarité
EFA Ecole Française des Affaires	1988	Bac + Concours	2 ans	80	16.000 Dh/an
ESG Ecole Supérieure de Gestion	1985	** - ESG : Bac + Concours - ESGF, ESGI, ESGCI : Bac+Dossier+entretien	4 ans	380	Frais d'inscript. :1750Dh 1ère Année : 19 500 Dh 2ème Année : 18 500Dh 3&4ème Année :16 000 Dh
ESIG Ecole Supérieure d'Informatique et de Gestion appliquée	1985	Bac + Dossier + Entretien + Test	3 ans	300 (dont 50 MBA)	Frais d'inscript. : 1000 Dh 5 250 Dh par trimestre
IGA Institut Technique de Gestion	1981	Bac + Dossier	2 ans	155 1er Cycle	Frais d'inscript. : 600 Dh 3 600 Dh par trimestre
I.H.E.E.S Institut des hautes Etudes Economiques et Sociales	1984	Bac + Dossier	4 ans	150	Frais d'inscript. : 600 Dh 3 600 Dh par trimestre
I.I.H.E. International Institute for higher Education	1988	Bac+Dossier	4 ans	-	Frais d'inscript. :700Dh Filière en anglais : 10.500Dh/semestre
Sup. de Co. Ecole Supérieure de Commerce	1987	Bac+Dossier+Test	4 ans	480	Frais d'inscript. :1 800Dh - 14 850 Dh/an

** - **ESGC : Filière de Gestion et Commerce**
- **ESGF : Filière de Gestion et Finances**
- **ESGI : Filière de Gestion et Informatique**
- **ESGCI : Filière de Commerce International**

BESOINS EN FORMATION DU SECTEUR PRIVE MAROCAIN

Tableau récapitulatif des écoles de gestion au Maroc (suite)

Ecole	Date de création	Conditions d'admission	Durée de formation	Nombre d'étudiants	Frais de scolarité
I.B.I	1988	Bac+Concours	2 ans	-	Frais d'inscript :500 Dh
The International					- 1 500 Dh/mois
Business institute					
H.E.M.	1988	Bac+Concours	4 ans	60	Frais d'inscript : 800 Dh
Institut des Hautes					1ère Année : 22 500 Dh
Etudes de Management					A partir de la 2ème Année :
I.M.M	1990	Bac+Concours	3 ans	-	An. préparatoire 28.000Dh
Institut Marocain		1 année préparatoire			Formation Sup. Management
de Management		ou DEUG			32.000 Dh/an
IS.G.	1984	Bac+Entretien	2 ans	200	Frais d'inscript : 900 Dh
Inst. Sup. de Gest.					10 800 Dh/an